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**A longitudinal qualitative study of foreign students at the University of Szeged - Initial results on motivation, expectations, satisfaction and loyalty**

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*Abstract*

*Recently, a considerable literature has grown up around the theme of higher education. However, previous studies have failed to demonstrate longitudinal qualitative measures in this field.*

*The current study aims at investigating the motivation, expectations, satisfaction and loyalty of foreign students throughout their time spent in Hungary at a Higher Education Institution.*

*Due to the longevity of the study programmes, these factors are examined separately.*

*In the paper a qualitative research method is applied. In-depth interviews were conducted in three phases with seventeen foreign students throughout their studies in Hungary. The longitudinal interviews were analysed manually. I found that most students were internally motivated, had study-related expectations and were satisfied with the University and the study environment. Their loyalty is projected through the fact that most of them would suggest studying at this specific HEI to other students. In fact, this recommendation has already materialized in certain cases.*

*The findings implicate that a country- and institution-specific study is essential to understand foreign student needs at a specific HEI. Moreover, motivation, expectations, satisfaction and loyalty should be studied together, but in separate phases of the students' study programme.*

*Key words: motivation, expectation, satisfaction, loyalty, WOM, HEI, higher education*

## **1. Introduction**

In the new global economy, higher education has become a central issue. Internationalization is a major area of interest within the currently mentioned field. In recent years, there has been an increasing interest in foreign students' motivation, expectation, satisfaction and loyalty.

However, the search of the literature revealed few studies which focus on a qualitative analysis of foreign students (Roman 2014, Sultan – Wong 2012a, Sultan – Wong 2012b, Templeman et al. 2016, Gallarza et al. 2017). Surprisingly, there has been little longitudinal qualitative analysis (Patterson et al. 1998) on country- and institution-specific motivation, expectation, satisfaction and loyalty of foreign students. So far, very little attention has been paid to the role of examining these factors together longitudinally.

Previous studies focused solely on one of the above mentioned fields. Separate studies have been conducted in the field of foreign student motivation, expectations and loyalty. This indicates a need to understand these concepts together.

This paper reports on a study covering foreign students' motivation, expectations, satisfaction and loyalty altogether. The specific objective of this study was to investigate these factors with a qualitative method. This study was exploratory and interpretative in nature. By employing a qualitative mode of enquiry, specifically in-depth interviews, I attempt to highlight the similarities and differences between students and their motivation, expectations, satisfaction and loyalty towards the HEI.

This is among the first studies to undertake a longitudinal analysis of these factors by employing in-depth interviews on a panel of foreign students. Therefore, this study provides an exciting opportunity to see how the perception of foreign students change in terms of motivation, expectations, satisfaction and loyalty. However, this study is unable to cover every single foreign student of the HEI and the data are not representative. The reader should bear in mind that the study is based on longitudinal in-depth interviews and it does not focus on quantitative methods.

The paper is composed of five main chapters. After the introduction, the second section examines the relevant literature regarding motivation, expectations, satisfaction, loyalty and word-of-mouth. Chapter three introduces the methodology used for this study. The fourth chapter analyses the results of the in-depth interviews undertaken during the research. The final section draws together the key findings and identifies areas for future research.

## **2. Literature review**

In the following section, the theoretical background is investigated. The main concepts of motivation, expectations, satisfaction and loyalty is discussed.

### **2.1 Motivation**

Different theories exist in the literature regarding motivation. A seminal study in this area is the work of Maslow (1987). According to him, the different motives are followed by each other based on their biological strength. When a lower need is satisfied, a hierarchically higher need can arise. Hull's drive



approach (1943) shows that our behaviour is driven by drives. Behaving in a certain way could reduce the drive itself. According to this approach, the person aims at being in an ideal state of mind and reducing the stress by acting upon a certain drive. Maehr's (1976) continuing motivation focuses on how motivation maintains the ability of people to study for a long period of time, even if there are no apparent and visible rewards from it (Kaplan et al. 2009). Skinner's (1995) Perceived Control theory states that our behaviour is driven by the feedback that we get. If it is positive or negative, a person would aim at getting the reward or avoiding the negative feedback again.

As we can see, there are numerous approaches to identifying different motivational types. In this study, I am going to concentrate on one classic approach, namely the self-determination approach (Deci et al. 1999, Ryan – Deci 2000), which is the best for the aim of the current research.

Before examining their theory, a definition of motivation is needed. Motivation is defined as the underlying reasons of the behaviour of people (Guay et al. 2010). Elliot and Fryer (2008) define the same as "those psychological processes that cause the arousal, direction, and persistence of voluntary actions that are goal directed". In the classical human-specific self-determination approach, behaviour of people can be categorized. Vallerand et al. (1997) researched the factors that can have an influence on motivation. In his study, he concludes that different social factors influence the motivational types.

Motivation types are distinguished by Deci and Ryan (1985). They distinguish between two basic types of human-specific motivation, namely the extrinsic and the intrinsic motivation. Both types refer to the personal characteristics of people. Extrinsic motivation refers to those aims which include reaching an external benefit or avoiding a negative issue or harm. Extrinsic motivation always has an external aspect, while intrinsic motivation comes from within a person. Intrinsic motivation reflects the needs of the person to get to know their environment better and satisfy their eagerness to learn and develop themselves. In the present study the motivation of foreign students is interpreted based on this categorization.

To date, a number of studies have investigated the motivation of foreign students. Some works focus on the differentiation of certain theoretical aspects of motivation, namely extrinsic and intrinsic motivation of the Self-Determination theory (Deci et al. 1991), while others deal with finding the main motivation of foreign students regardless of categorization. In their research, Deci et al. (1991) identifies intrinsic motivation as the major causes of academic success. Areepattamannil et al. (2011) also found that students who went abroad had higher level of intrinsic motivation and better grades than those, who stayed at home. Students, who stayed in their country had stronger extrinsic motivation. Ntoumanis (2001) also observes students based on intrinsic and extrinsic motivation. A questionnaire was developed by Guay et al. (2000) to measure intrinsic and extrinsic motivation of students. While in the works of Cubillo et al. (2006), Nyaupane et al. (2011), Hackney et al. (2013) different motivation factors are researched why students pursue foreign education regardless of the intrinsic and extrinsic categorization. Most scientists applied different scales for measuring student motivation (Hanousek – Hegarty 2015, Stover et al. 2012, Utvaer and Haugan 2016, Chirkov et al. 2007, Guay et al. 2000). Hanousek and Hegarty (2015), Stover et al. (2012) and Utvaer and Haugan (2016) used the Academic Motivation Scale of Vallerand et al. (1992), while Chirkov et al. (2007) experimented with a newly developed approach, the Self-Regulation Questionnaire. What is common in all the above mention studies is that their

methodology included quantitative measures. Qualitative measures have been rarely used (Roman 2014, Sultan – Wong 2012a, Sultan – Wong 2012b, Templeman et al. 2016) and in most cases they are applied in tandem with quantitative measures (Zimmerman 2008). Most longitudinal methods involve quantitative measures respectively and are aimed at different motivation types, such as language learning (Sasaki 2011). Little is known about the usage of longitudinal in-depth interviews with a panel of students. Therefore, the present study aims at investigating their usage.

## **2.2. Expectations**

A great deal of previous research focused on expectations. Oliver (1980, 1985) has seminal works in this field. His results can be used in the field of marketing researches (Oliver 1980, Oliver 1985). According to his Expectation Confirmation Theory (ECT), expectations are relevant to those attributes or characteristics that are thought to be connected to a certain product or service (Oliver 1985, Oliver – Winer 1987, Elkhani – Bakri 2012).

In the literature, there is no common agreement how to categorize expectations. Some scholars differentiate between forecast, normative, ideal and minimum tolerable expectations (Woodruff 1983, Oliver 2015). These refer to expectations prior to purchase (Woodruff 1983, Oliver 2015). Therefore, they are not relevant in the current study.

Expectations can be categorized based on the time of research enquiry (Higgs et al. 2005). If a customer is asked of their expectation prior to purchase, that is called forecast expectation. If they are asked after purchase to remember the expectations beforehand, that is called recalled expectation (Higgs et al. 2005). Evidently, forecast expectations seem a better choice to study, because then the customer is not biased by the purchase itself. However, in the current study, I am going to focus on recalled expectations, due to the limited access to foreign students.

Several recent studies have been carried out about the expectations of foreign students regarding the foreign university and country they applied to. Most studies use questionnaire method to identify foreign student expectations (Carvalho – Mota 2010, Arquero et al. 2009, Byrne – Flood 2005). As the categorization of expectations differs in literature, usually, the aim of the research determines the categories. Anderson (2007) divides foreign student expectations into nine categories (e.g.: personal development, social environment and study success, etc.). However, the division of foreign student expectations is not so detailed in many other studies, because they mainly focus on one type. Social expectations of foreign students are examined by Ding and Hauzheng 2012 and Dewey et al. (2013), personal expectations are studied by Firmin et al. (2013), cultural expectations are investigated by Czerwionka et al. (2015), while Bryla (2015) focused on labour-market expectations and Cheng (2014) on educational expectations. Interestingly, DeBacker and Routon (2017) focused on parental expectations of their children's education.

The study of Carvalho and Mota (2010) focuses solely on the institution-related expectations, while the questionnaire of Byrne and Flood (2005) already includes in-school and out-of-school elements. Previously, a longitudinal tool was also applied to examine pre- and post-trip expectations (Martin et al. 1995).

I conclude from the literature that in certain cases, expectations are studied together with motivation (Byrne et al. 2012, Arquero et al. 2009). This implies that the two notions are in connection with each other. However, they have been rarely studied with qualitative methods.

### **2.3. Satisfaction**

Research into satisfaction has a long history. A core work in the field is the above mentioned Expectation Confirmation Theory (ECT) (Oliver 1980, 1985). According to ECT, customers have certain pre-purchase expectations. Customer experience of the desired product or service is the determiner of satisfaction (Oliver 1980, 1985). In the studies of Yi (1990), they distinguish between process-oriented and result-oriented satisfaction. Result-oriented satisfaction refers directly to the experience after consumption. According to process-oriented satisfaction, the consumption process is the most important. I define foreign student satisfaction as the combination of process- and result-oriented satisfaction combined. Both the satisfaction during the time of their studies and the satisfaction after graduation is important.

The Expectation Confirmation Theory is later expanded by Elkhani and Bakri (2012) and is called Expectancy Disconfirmation Theory (EDT). It differentiates between pre- and post-purchase satisfaction based on whether the customer's expectations are met or not. The consumer compares expectations to perceived performance, which leads to a subjective disconfirmation (Yi 1990).

Churchill and Surprenant (1982, 493) define satisfaction as the result of usage and purchase, which is based on the customer's comparison of benefit and cost analysis. According to Oliver et al. (1997), satisfaction is a pleasurable fulfilment of certain needs, desires or goals.

In the present study, higher education is viewed as a service. However, service satisfaction has different aspects. Zeithaml (1981) argues that customers employ certain criteria to a higher extent, when it comes to services, namely experience and trust. Parasuraman et al. (1991) created a method, which measures service quality based on the difference between consumer expectations and experience. It is called SERVQUAL and measures the tangibles, reliability, responsiveness, assurance and empathy.

The satisfaction of foreign students with the chosen HEI has been largely explored. However, most studies typify satisfaction differently. Among these researches, several focus on in-school satisfaction (Alves – Raposo 2007, Alves – Raposo 2009, Elliot – Healy 2001, Wiers-Jenssen et al. 2002, Lenton 2015, Cardona – Bravo 2012, Owlia – Aspinwall 1996, El-Hilali et al. 2015, Roman 2014, Lee 2010). Most often, they enlist the following factors as the source of foreign student satisfaction: available study-

programmes, location, size, complexity of the institution, quality of teaching (Huybers et al. 2015), feedback from teachers, communication with teachers (Jager – Gbadamosi 2013), appropriate study schedule, supporting facilities for students, physical environment and equipment (Wiers-Jenssen et al. 2002). Although there is a study (Yang et al. 2013) in which scientists distinguish classroom factors from non-classroom factors, non-classroom factors are strongly related to the school (e.g.: location of school, GPA, year of higher education studies).

Out-of-school satisfaction is rarely investigated in terms of foreign students. However, I think that it is extremely important. There are certain studies, though, which investigate in-school and out-of-school factors. Yet, most of them focus solely on local students not foreign ones. Schertzer and Schertzer (2004) uncovered why students leave a certain HEI. They found that transition and financial problems are the most common reasons. They also claim that the happiness of students depends on the life outside the classroom excessively. Evans (1972) followed the same logic and stated that student satisfaction is highly dependent not only on the quality of education and recognition, but also on social life, living and working environment and the compensation for study-pressure. All the above mentioned studies used quantitative measures. Qualitative methods are rarely used to identify satisfaction (Sultan – Wong 2012a, Sultan – Wong 2012b).

Regardless of categorization, foreign student satisfaction is usually researched in tandem with foreign student expectations Alves – Raposo 2007, Alves – Raposo 2009, Elliot – Healy 2001, Wiers-Jenssen et al. 2002, Lenton 2015, Cardona – Bravo 2012, Owlia – Aspinwall 1996, El-Hilali et al. 2015, Roman 2014, Lee 2010. Therefore, I assume that these notions are also closely related.

## **2.4. Loyalty and Word-of-Mouth**

A considerable amount of literature has been published on loyalty. In most cases, loyalty is studied together with satisfaction and the retention of students (Oliver 1999, Reichheld et al. 2000, Elliot – Healy 2001, Reichheld 2003, Alves – Raposo 2007, Alves – Raposo 2009, Giner – Rillo 2016). This is why I assume that they are connected.

However, Reichheld et al. (2000) argues that satisfaction is not always enough to retain customers or make them loyal, but it is a key element to growth (Reichheld 2003). In order to be successful, a company or institution should create and provide value for its customers, its employees and its stakeholders as well (Reichheld et al. 2000).

Loyalty has been defined variously in literature. Some, in the early phases of the study of loyalty, argue that loyalty can be measured by retention and satisfaction (Reichheld – Sasser 1990, Reichheld 1996), others say that re-purchase is a good indicator (Tellis 1988, Reichheld et al. 2000, Oliver 1999, Neal 1999). While Newman and Werbel (1973) argued that re-purchase in itself is weak and brand deliberation is needed for the satisfaction of the customer. A more current view states that satisfaction and re-purchase are not enough, but the customer's willingness is needed to advocate and promote the product or service.

In other words, recommendation or word-of-mouth (WOM) is needed (Reinartz – Kumar 2002, Reichheld 2003).

Oliver (1999) defines loyalty as “a deeply held commitment to rebuy or repatronize a preferred product/service consistently in the future, thereby causing repetitive same-brand or same brand-set purchasing, despite situational influences and marketing efforts having the potential to cause switching behaviour” (Oliver 1999, 34.).

However, this definition lacks an important element that the current study needs. Therefore, I rely on the following definition. Reichheld (2003) states that loyalty is “the willingness of someone – a customer, an employee, a friend – to make an investment or personal sacrifice in order to strengthen a relationship.” (Reichheld 2003, 46). Additionally, he also claims that “customer loyalty is about much more than repeat purchases” (Reichheld 2003, 46). He determines recommendation as a key element to loyalty.

Numerous studies have attempted to explain the loyalty of foreign students to their HEI (Alves – Raposo 2007, Alves – Raposo 2009, Giner – Rillo 2016). Some of them only define several factors and needs which, if satisfied, can lead to loyalty (Schertzer – Schertzer 2004, Bryla 2014, Giner – Rillo 2016). While some other studies tried to investigate how loyalty materializes in foreign students as WOM recommendations (Alves – Raposo 2007, Alves – Raposo 2009).

The importance of WOM in foreign student satisfaction has been explored by Alves and Raposo (2007). They concluded that if a student is satisfied with the education, they will recommend the institution by WOM. Conversely, WOM is the result of their satisfaction.

It is apparent that WOM has significant importance in satisfaction, therefore the definition of WOM is necessary. Word-of-mouth is interpersonal communication (Arndt 1967) that is informal and about a product, its usage or its characteristics (Bughin et al. 2010).

In terms of measurement, in his study, Reichheld (2003) uses a one-question method of determining customer loyalty. They use a simple question of “How likely is it that you would recommend (X) to a friend or colleague?”. They found that the answer to this one question could be the sole determiner of company success and customer loyalty. Conversely, growth by WOM is the key.

As previous studies show, loyalty is usually studied together with satisfaction, and there is a link between them (Kandampully 1998, Gronholdt et al. 2000, Alves – Raposo 2007, Alves – Raposo 2009, Giner – Rillo 2016). In the current study I intend to find out if this applies to a number of foreign students as well at the researched university and I intend to reveal the possible relationship between satisfaction and loyalty, and loyalty and WOM.

Together these studies indicate that there has been a significant effort of researchers to uncover motivation, expectations, satisfaction and loyalty of foreign students. However, the literature lacks

evidence based on qualitative methods. Overall, these studies highlight the need for a qualitative insight into motivation, expectations, satisfaction and loyalty of foreign students.

### 3. Methodology

This particular study employs a qualitative research method. Longitudinal in-depth interviews are conducted with a panel of foreign students to explore their motivation, expectations, satisfaction and loyalty throughout their study-programmes at a HEI.

Previous researches mainly focused on quantitative data obtainment from foreign students (Elliot – Healy 2001, Wiers-Jenssen et al. 2002, Anderson 2007, Firmin et al. 2013, Lenton 2015, Cardona – Bravo 2012, Owlia – Aspinwall 1996, El-Hilali et al. 2015, Roman 2014, Kandampully 1998, Gronholdt et al. 2000, Alves – Raposo 2007, Alves – Raposo 2009, Giner – Rillo 2016, Cheng 2014, Bryla 2015, Byrne and Flood 2005). Most of them also looked at motivation, expectations, satisfaction and loyalty separately and only a small number deals with all the notions together, but in those cases, quantitative methods are used (Alves – Raposo 2007, Alves – Raposo 2009).

However, there is evidence in the literature for the usage of qualitative measures in the assessment of foreign students (Roman 2014, Sultan – Wong 2012a, Sultan – Wong 2012b, Templeman et al. 2016, Gallarza et al. 2017, Patterson et al. 1998). In-depth interviews offer an effective way of getting to know the personal opinion of students better and this method has already been utilized (Griner – Sobol 2014, Patterson et al. 1998).

The venue of the current research is the University of Szeged, in Eastern-Europe, Hungary. This particular HEI accepts foreign students with and without scholarships and foreign student number is growing continuously (Kéri 2016). The growing population of foreign students gives researchers the opportunity to understand their needs better to be able to satisfy them in the future.

Foreign students of the University of Szeged constitute the subject of the current research. A small sample was chosen because of the expected difficulty of reaching them and obtaining qualitative data. Altogether 18 foreign students were chosen. 6 students started studying in the Bachelor's programme, 6 in the Master's programme and 6 in PhD Programme of the University of Szeged. Demographic data of these students can be seen in the first *Appendix 1*. These students constitute a panel. Only one Master's student was unresponsive to enquiries for interviews. Therefore, the final panel consists of 17 students.

In-depth interviews are conducted with the panel in three phases, at the beginning, in the middle, and in the end of their studies. In the first phase, their motivation and expectations are studied. In the second phase, I asked them about their present expectations and satisfaction. While in the third phase, continuing motivation, met or unmet expectations, overall satisfaction, and loyalty are investigated.

I started the research in the fall of 2015. To date (2017) the first two phases are completed wholly, but the third phase is only done with students who finished their masters, as two years have passed since the start of the first interviews. Therefore, in the current research paper, I only concentrate on the 6 Master's students. Notwithstanding the incompleteness, the series of interviews already give an exceptional insight into the researched factors throughout students' life in Hungary.

#### **4. Results**

In this section, the primary results of the longitudinal research are presented in a timely order. First different motivations and expectations are revealed, followed by the satisfaction of students. Finally, Master's students' overall satisfaction and loyalty is introduced.

##### **4.1. Motivation**

In the first phase the main motivation and expectations were asked from foreign students. In this study, I differentiate their motivation (intrinsic or extrinsic) based on the theory of Deci and Ryan (1985) and based on the studies of Deci et al. (1991). The interviewed students' motivation differs in certain aspects. Some of them are intrinsically, some of them are extrinsically motivated. While there are also students, who are motivated by both two types.

Intrinsically motivated students stated the following:

*'I was curious to discover (Hungary).', 'The cultural things interest me about Hungary.'* (Student 2 – Colombia)

*'This is a new adventure for me to discover the country and this is the centre of Europe.'* (Student 3 – Algeria)

*'My goal was studying.'* (Student 4 – Republic of Korea)

However, among the six students, there was only one person, who was only extrinsically motivated.

*'I wanted to come to Europe to have a better degree...' (Student 5 – Tunisia)*

Interestingly, we can find students who were both intrinsically and extrinsically motivated.

Extrinsic motivation:

*'I saw its (the university's) university rank...','... I found a scholarship here (in Hungary) ...', '... the currency is very near to my currency in Turkey...'*, (Student 1 – Turkey)

Intrinsic motivation:

*'I have been to Budapest before, so I liked Hungary and I liked people...'*, *'Szeged is a university city. I like small cities.'* (Student 1 – Turkey)

Extrinsic motivation:

*'They (people who graduate from a Hungarian university) can improve their lives and to have a better future... and I want to be that level.. to work with business.'* (Student 6 – Laos)

Intrinsic motivation:

*'I can learn a lot about people's lifestyle, economy, etc. Hungary is part of the EU and my country is going to be a member of AEC (Asian Economic Community), so I want to know how the integration here has been and maybe I can learn from (it) and we can adapt it to use in our country, because Hungary and Laos have the similar potential.'* (Student 6 – Laos)

It is also very interesting, that Word-of Mouth already appeared at the very first stage of the panel interviews, when students were asked why they chose Hungary and the University of Szeged specifically. This shows that WOM has a huge influence on students when they choose their future higher education institution. I propose that WOM is an influencing motivational factor when foreign students choose a HEI.

*'I hear it is one of the best university cities or towns in Europe.'* (Student 2 – Colombia)



*'... my sister is here... and the Faculty has good reputation.'*, *'In my country... the teachers told us we can go (to Hungary) and major in our field.'* (Student 3 – Algeria)

*'I saw which college is famous and well-known for English studies, so that is why Szeged. They said that Szeged is the best one, so I chose Szeged.'* (Student 4 – Republic of Korea)

*'I have someone here ... and he told me that Szeged is the best place in Hungary to study.'* (Student 5 – Tunisia)

*'Hungary is a very good place to study as I heard from many people in my university in Laos, (there are) many people, who graduated from Hungary.'*, *'I heard that this (Szeged) is a beautiful city, because one of my friends was here before.'* (Student 6 – Laos)

In the second phase of the interviews, motivations were not discussed. However, in the third phase, students were asked if they had been motivated throughout their studies or not. In most cases, they kept their motivation to study and they mostly mentioned motivation related to academic circumstances. Therefore, I conclude that motivation is a key factor for foreign students during their studies.

*'I was motivated during my studies, for my teachers and professors. They helped for personal improvement... But sometimes, I did not feel very motivated because of my classmates. ... they don't like that we (foreign students) study and we try to get higher marks.'* (Student 1 – Turkey)

*'I never considered the option of failing. Forward is the only direction.'* (Student 2 – Colombia)

*'Sure. Thanks to the professors' supervisions and other students' help, I could be motivated to study a lot.'* (Student 4 – Republic of Korea)

There was only one student who did not feel motivated at all. It is interesting though, that this student also finished the studies, in spite of the hardships they encountered.

*'Not so much actually (motivated). Actually, when I was studying, I was crying all the time. I was alone, I did not know if I was on the right side. It was really hard for me from the beginning to end.'* (Student 3 – Algeria)

From these we can see that foreign student motivation can be diverse. Some of them are intrinsically and some of them are extrinsically motivated, or both. When we talk about continuing motivation, each person has their own reasons for keeping up their motivation to study. Most of these depend on in-school or university related issues (teachers, professors and classmates).

#### **4.2. Expectations**

In the first phase of the study, besides their motivation, initial expectations were asked from students. We can see similar enquiries in the researches of Byrne et al. (2012), Arquero et al. (2009), Ding and Hauzheng (2012), Dewey et al. (2013), Firmin et al. (2013), Czerwionka et al. (2015), Bryla (2015), Cheng (2014), DeBacker and Routon (2017).

In the current research, expectations are categorized as recalled expectations, because students were asked after the purchase of the service (Higgs et al. 2005).

From the answers it is apparent that students have expectations towards certain aspects of their foreign education. Firstly, they have expectations about themselves, which can be connected to self-actualization. They would like to show they could accomplish their studies abroad. Secondly, they also have work-related expectations. If they finish the university, they would like to get a better job and higher living standards. Some of them would like to continue their studies and expect an academic career. At this level school-related and non-school-related expectations are not separated from each other. Most of the respondents only focused on the education and their own self.

*'My expectations are a little bit about myself. I will have some competences here, so I can use it in my country.'*, *'I am sure I will have a better career. I think I will have a chance to get a better job and better salary.'* (Student 1 – Turkey)

*'I will improve my standards of living. I am interested in making a PhD and Hungary is still an option to keep studying. I would like very much to take a teacher or a decent career and academic career.'*, *'I meet a lot of new people.'* (Student 2 – Colombia)

*'I want to do my PhD', 'I can improve my language and myself.', 'I hope that I'll get a job and start a new life.'* (Student 3 – Algeria)

*'I can study what I want... All day I can focus on the English...', '... with the material I can get general, overall knowledge.'* (Student 4 – Republic of Korea)

*'I want to have good formation (basics), I want to be a good doctor and then I improve my skills and everything.', 'It is an international degree and you can find many opportunities after finishing your studies here.'* (Student 5 – Tunisia)

*'I want to have a master degree, because it is a very good option to get a good job.', 'We have a higher salary when you have a masters.', 'I want to teach my children about life in here.'* (Student 6 – Laos)

In the second phase, students were asked if their expectations had been met or not. The results of these questions can be found in the next section, satisfaction, as usually they are studied together (Alves – Raposo 2007, Alves – Raposo 2009, Elliot – Healy 2001, Wiers-Jenssen et al. 2002, Lenton 2015, Cardona – Bravo 2012, Owlia – Aspinwall 1996, El-Hilali et al. 2015, Roman 2014, Lee 2010). During this phase, in-school and out-of-school expectations already separate from each other. It shows that the students got to know the country, culture, city and education system better. In the third phase, expectations were not discussed.

### **4.3. Satisfaction**

Satisfaction of students was studied in the second and third phase of the research. Based on the Expectation Confirmation Theory (Oliver 1980, 1985), the main aim was to get to know if students' expectations were met or not. There was only one student who left the university from the panel at this time, but I could obtain data from her via e-mail. The same question was asked from the respondents in the third phase of the interviews. The phase is indicated in each case so that the conclusions could be understood easily.

In this section, in- and out-of school expectations and satisfaction are mentioned. The reason of this might be that the students had already spent time in the country and got to know their own expectations as well regarding activities that are not closely related to the school.

We can conclude that most of the students were satisfied with the in- and out-of-school activities. Even if one student (Student 4) had to leave Hungary before graduation (for personal reasons), the student is satisfied with the education at the University of Szeged.

Satisfaction with school-related topics is more likely to appear, while some respondents mentioned the lack of possibilities in a small city, Szeged. However, there was one respondent (Student 3), who was not at all satisfied with the university, but liked the out-of-school part better.

Conversely, if satisfaction of foreign students is discussed, in-school and out-of-school related factors should both be investigated.

*'I am satisfied and I am not satisfied. I am not satisfied with the overall quality of the teachers. I was expecting something else.'*, *'But for the university, I see that it is very open to improve.'*, *'... authorities are helpful, ... my coordinators or my officers at international relations are always helpful.'*, *'Next week, I am going on a conference in Belgrade. I get the chances here, because I can travel freely.'* (Student 1 – Turkey, Second Phase)

*'Yes (satisfied) for learning and learning many things about law and business... No, because when I compare the department, education here is tough and it is totally international relations. Professors are quite new here... I was a little bit surprised and disappointed about seeing some students (teaching), who have a little experience. I was expecting a little more experienced teachers.'*, *'For student activities, yes. (satisfied)'* (Student 1 – Turkey, Third Phase)

*'It went better than expected in some ways.'*, *'I feel academically challenged...'*, *'My teachers speak very good English. I am satisfied with them.'*, *'Academically speaking, all my expectations were met. Maybe I expected to travel a lot more in Europe.'* (Student 2 – Colombia, Second Phase)

*'Yes, absolutely (satisfied).'*, *'I feel I learned a lot. Culturally, academically in a lot of issues. So in many aspects, I am definitely satisfied.'* (Student 2 – Colombia, Third Phase)

*'I think we have, we can reach a good level of studies, the teachers are good. I am not speaking about my case, but I know that in general they are.'*, *'When you have to do your studies alone, it is hard.'* (Student 3 – Algeria, Second Phase)

*'Actually, no (satisfaction). I was studying for the exams and not to know things. I was always stressed and I was studying by my own. The language was really hard for me, because I was studying everything in Hungarian.'*, *'For me it was only bad.'*, *'That side (out-of-school) completely yes (satisfied).* (Student 3 – Algeria, Third Phase)

*'With regard to school, I met my expectations in the University of Szeged. Unfortunately, I couldn't join the out-of-school activities due to the personal circumstances. That was the only thing I regret.'* (Student 4 – Republic of Korea, Second Phase)

*'I am satisfied with the university of Szeged. It has well organized education system and it is excellent for supporting the international students.'* (Student 4 – Republic of Korea, Third Phase)

*'From the university, this is what I expected. It is not easy, it is not an easy field, I don't have a lot of time.'*, *'I thought that people would be more happy, more cheerful. (There is) a lot of pessimism. I feel it in the complaining.'* (Student 5 – Tunisia, Second Phase)

*'(There is) nothing in Szeged. You can not have the choice. You can not choose between the prestige place and the low place and the middle place. All of them are the same concept.'* (Student 5 – Tunisia, Third Phase)

*'I think I am really satisfied and I feel that my knowledge has improved a lot and I got a lot of friends. I have learned a lot from my professors. My vision is wider and I can see bigger problems better than before.'*, *'I think that my expectations about Europe are fulfilled.'* (Student 6 – Laos, Second Phase)

*'Actually, it is over my expectations, because my BA ground was not really good. So everything that I learned in Hungary was almost new.'*, *'Szeged made me feel like home.'* (Student 6 – Laos) (Student 6 – Laos, Third Phase)

#### **4.3. Loyalty and WOM**

Loyalty and WOM were only studied in the third phase of the research. However, there have already been answers given connected to WOM during the first phase of the interview, which shows its importance and can be seen in chapter 4.1.

Based on the definition of Reichheld (2003) and on the previous researches on foreign student loyalty and WOM (Oliver 1999, Reichheld et al. 2000, Elliot – Healy 2001, Reichheld 2003, Alves – Raposo 2007, Alves – Raposo 2009, Giner – Rillo 2016), repurchase possibility and possible future WOM recommendation were asked from students in the third phase. More specifically, they were asked if they would choose the same University and same city again and if they would recommend the University and the city to their friends or acquaintances.

We can see that even those students who were not satisfied would recommend the university to others for certain reasons. In this case, they would also tell the others certain warnings, which may count as negative word-of-mouth. Though, most of them were satisfied and showed interest in promoting the country and the University to their friends and acquaintances. Moreover, some of them have already done it and as a result, their friends are now studying in Hungary. This can not be a better indicator of their satisfaction towards the University, the city, the culture and the country.

Repurchase (choosing it again): *'It is a hard question. For masters yes, but for PhD no. ... in Szeged, I don't know if I can survive.'* (Student 1 – Turkey)

Recommendation: *'I already recommended it. After my studies, my close friend, she came to study for her PhD studies. I recommended for some points and I already warned for some points.'*, *'At least three people now (came to Szeged because of her recommendations), after seeing my studies in Hungary. This is like a chain.'* (Student 1 – Turkey)

Repurchase (choosing it again): *'Yes, absolutely. It is a no-brainer.'* (Student 2 – Colombia)

Recommendation: *'Absolutely. I have already done it. To some of my friends.'* (Student 2 – Colombia)

Repurchase (choosing it again): *'Yes, but I would change something for sure. Maybe not Szeged, but Budapest and to have out-of-school activities to do.'* (Student 3 – Algeria)

Recommendation: *'For sure, because my case was different, but I know other students' were good.'* (Student 3 – Algeria)

Repurchase (choosing it again): *'In the near future, I will go back to Szeged to meet my friends. I miss my mentor, Lily, and my professors, Rosa.'* (Student 4 – Republic of Korea)

Recommendation: *'Absolutely, I already recommended to some of Filipino students who are studying in Korea to study in Hungary.'* (Student 4 – Republic of Korea)

Repurchase (choosing it again): *'In my case, it is not about choice, but about opportunity. This opportunity was the best opportunity that was in front of me. If I had the same circumstances, I would choose it again.'* (Student 5 – Tunisia)

Recommendation: *'Yeah, why not, if they are hard workers.'*, *'Honestly, I think that the tuition fees are so high what they are supposed to.'* (Student 5 – Tunisia)

Repurchase (choosing it again): *'Of course, even though Szeged was not my first choice at that time...'* (Student 6 – Laos)

Recommendation: *'Sure, yes. One of my friends, he is now in Szeged, yeah. I recommended him to study in the same major. And one of my friends, he is going to the university in Szeged, because he said he is going to Szeged, I also recommended him.'* (Student 6 – Laos)

## 5. Conclusions

This particular study used a qualitative research method. Longitudinal in-depth interviews are conducted with a panel of foreign students to explore their motivation, expectations, satisfaction and loyalty throughout their study-programmes at a HEI.

Previous researches mainly focused on quantitative data obtainment from foreign students (Elliot – Healy 2001, Wiers-Jenssen et al. 2002, Anderson 2007, Firmin et al. 2013, Lenton 2015, Cardona – Bravo 2012, Owlia – Aspinwall 1996, El-Hilali et al. 2015, Roman 2014, Kandampully 1998, Gronholdt et al. 2000, Alves – Raposo 2007, Alves – Raposo 2009, Giner – Rillo 2016, Cheng 2014, Bryla 2015, Byrne and Flood 2005). Most of them also looked at motivation, expectations, satisfaction and loyalty separately and only a small number deals with all the notions together, but in those cases, quantitative methods are used (Alves – Raposo 2007, Alves – Raposo 2009).

However, in certain cases, qualitative measures are used in the assessment of foreign students (Roman 2014, Sultan – Wong 2012a, Sultan – Wong 2012b, Templeman et al. 2016, Gallarza et al. 2017, Patterson et al. 1998), but these usually depict only one specific time in the lives of the students and there was a need for longitudinal interviews with foreign students to understand their motivation, expectations, satisfaction and loyalty better. The present study aimed at filling this knowledge gap.

Based on the results of the qualitative research, it is quite interesting that word-of-mouth appears in the first stage of the interviews. Almost every respondent mentioned it as an influencing factor of coming to

Hungary. Therefore, I can conclude, that not only satisfaction and WOM are connected, but there must be a relationship between WOM and motivation as well. Future quantitative researches should pay much more attention to the relationship between motivation and WOM of foreign students.

Regarding motivations, I found that most students had intrinsic motivation, while extrinsic and mixed motivations also appeared. In terms of expectations, in-school and out-of-school factors should both be taken into careful consideration.

When discussing satisfaction, an expectancy based theory could be a good ground to start researching student satisfaction. If their expectations are met, it would lead to satisfaction and satisfaction would lead to WOM. Even if the student is not satisfied, WOM can appear. Although, this may be negative in certain aspects.

All in all, WOM is a result of students' satisfaction. However, due to the nature of the service students buy at a foreign university, they can not repeat the same purchase again (with the same programme at the same faculty – otherwise yes). Therefore, their loyalty can only materialize in WOM, but most times not in repurchase. Therefore, I conclude that foreign student loyalty is equal to positive word-of-mouth recommendations. If a foreign student recommends the studied HEI to their friends or acquaintances, it means they are loyal to the HEI.

The current research has certain limitations. Only a few number of students were interviewed in the panel, which means a limited number of responses and data which is not representative.

However, the current study establishes the basis for further researches, as it obtains qualitative data through three phases with a panel of foreign students.

In the future, my aim is to design a quantitative research which would be based on the current results. With the results of the current research, we can gain an insight into the motivation, expectations, satisfaction, loyalty and WOM of foreign students throughout their studies, which revealed certain connections between these factors. The development of a model and its quantitative analysis is essential.

However, we should bear in mind the key findings of the current research that the research factors are connected and there is even a connection between WOM and motivation of foreign students.

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Appendix

<b>Study level</b>	<b>Country of origin</b>	<b>Gender</b>	<b>Age</b>	<b>Studies</b>
PhD	India	Woman	25	Biology
PhD	Namibia	Man	36	Educational sciences



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PhD	India	Woman	25	Information technology
PhD	Ecuador	Man	unknown	Law
PhD	India	Man	31	Pharmaceutical sciences
PhD	Vietnam	Man	29	General Medicine
Master's	Turkey	Woman	26	International relations
Master's	Columbia	Man	29	Software development
Master's	Alger	Woman	23	Chemistry
Master's	Tunisia	Man	26	Dentistry
Master's	Republic of Korea	Woman	41	English studies
Master's	Laos	Man	22	International economy
Bachelor's	Kazakhstan	Woman	19	Business and Management
Bachelor's	Tunisia	Woman	19	Agricultural engineer
Bachelor's	Turkey	Man	unknown	History
Bachelor's	Tunisia	Man	22	Physical education
Bachelor's	Vietnam	Man	unknown	Mechanical engineer

Appendix 1: Demographic data of foreign students participating in the panel

**A Mobile App for Specific Learning Disorders: teachers and parents as catalyst of the diagnostic process.**

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**Abstract**

In the scientific environment, researcher are increasingly concerned with Specific Learning Disabilities (SLDs), a phenomenon with significant individual, social and work-related consequences. However, the scarcity of available scientific data and the lack of consistency of results generate ambiguity in diagnosing SLDs. While specialist health services are the main responsible for diagnosis, schools and parents play an important role in early detection of disorders. Despite the regulations and the information tools available to parents and teachers have been updated, they have little effectiveness on the ultimate ability to facilitate the process: a first detection of the SLDs key-indicators should quickly activate a specialist team to implement all diagnostic and compensatory measures. Therefore, we propose an educational-informational approach to deal with the SLDs, considering the system in which the pupil is involved: stakeholders should be trained to be a strategic lever for the clinic. We have designed a computer application capable of a) training as many people as possible b) providing rigorous information c) raising interest in the subject d) being utilizable in the Italian context. The paper contains a description of the concept and design of the program, focused on the educational features and the usability of the tool. The storyboard describing the app contains the main steps, each of which is strictly related to an educational goal. The contents, a user guide, copyright features, the structure, the educational games and the graphic creation of the app are described. The purpose of the program is to facilitate users to access key-information, catalyzing the contact between parents, teachers and the specialists who will accompany them along the path, limiting the experiences of losing and loneliness that affect them.

Keywords: Specific Learning Disorder; Dyslexia; Mobile App; Diagnosis;

## 1. Introduction

Only in Italy, 2,5 to 3,5% of the children in developmental age are diagnosed with Specific Learning Disorder (SLDs) (Consensus Conference, 2011). The term identifies an academic-based disorder originating in the central nervous system (APA, 2013, IDEIA, 2004) and challenging the individual in everyday life (Scanlon, 2013). The topic is considered relevant in the Italian context for several reasons: a) it is a widespread phenomenon; b) it has substantial consequences (e.g. School drop-out); c) the clinical expressiveness is different for “*orthographic transparent languages*” as Italian: consequently, it is not possible to use the scientific data deriving from Anglo-Saxon clinical records (Consensus Conference, 2011), especially for dyslexia.

The existing ambiguity in the scientific and research field has remarkable effect on the clinical activity: the diagnostic process, in particular, may be hampered by these factors. Still, a correct and prompt diagnosis is crucial to implement the compensating strategies and to protect the children against the main psychological, behavioral and emotional issues. A child with dyslexia, for instance, can be mistaken for a listless student (Ianes, Lucangeli & Mammarella, 2013).

On one side a correct diagnosis can be defined from the second and the third year of primary school. On the other side, it could be useful to detect the early indicators of a learning disability as, according to the Consensus Conference (2011), SLDs are being under-diagnosed, identified late or confused with other difficulties or disorders. Several recent studies (Bryant et al., 2005; Linan-Thompson, Vaughn & Cirino, 2006; Vaughn, et al., 2006; Wanzek & Vaughn, 2008; Bailet, Repper, Piasta & Murphy, 2009; Bryant, Bryant, Gersten, Scammaca & Chavez, 2008) reveal that taking in charge the pupils considered “at risk”, in time, has a *moderate* positive effect in improving the reading and the orthography in the short term.

Therefore, different health organizations and associations (ICD-10, 2007; APA, 2013) have collected the observable behaviors that may reveal an SLD. However, these manuals are addressed to health professionals, whereas both teachers and parents should be involved in this process, as they are in close contact with the child.

Software programs are already used as compensatory tools (Jiménez et al., 2007; Snellings, Van Der Leij, De Jon & Blok, 2009): in this paper, we would propose to use them also with an informative and communicative purpose, addressed to all the stakeholders involved in the diagnostic process of dyslexia.

Some researches (Hughes, McElnay & Fleming, 2001; McMullan, 2006) show that patients currently use the Internet and the websites to get in touch with the specialists who offer their medical advice free. Surely, it is important to prevent some of the risk of self-medication as misdiagnosis: in any case, this behavior indicates “there has been a shift in the role of the patient,

from passive recipient to active consumer of health information” (McMullan, 2006). Our purpose is therefore to offer a scientific guide to parents who would look for information anyway, encouraging the contact with the specialists and not being a substitute.

In particular, we describe the design of an Application, for smartphone and tablet, aimed to: a) inform parents and teachers of the main risk factors and indicators of dyslexia (from 3 to 7 years old); b) assess the actual learning of the users. In the description we specify: 1) the objectives, 2) the structure 3) the graphic features 4) the copyright and privacy policy 5) the Edugame, for assessment purpose.

In the macro-design phase of the App, we have collected the data from quantitative studies and official sources concerning Italian regulations: first of all we have summarized the diagnostic process in Italy and its referring legislation; then we have main risk indicators of SLDs. In the micro-design phase, we referred to the most recent Instructional Design method and, in particular, to the Bloom’s Taxonomy.

## 2. Methodology

To design the app we have collected the studies in literature and in the Italian regulation with a qualitative approach. We referred to a quantitative method of instructional design, especially in defining the objectives and the evaluation tools.

### 2.1 The Italian regulations for SLDs and dyslexia

The data were collected through the analysis of two main sources.

The first one is the official legislative texts, public and private acts endorsed by Italian Minister and shared through its official medium of dissemination (Gazzettaufficiale.it, 2016). In particular, we have analyzed the text of the L. n. 170 of October 2010, 8<sup>th</sup> (*Nuove norme in materia di disturbi specifici di apprendimento in ambito scolastico*): the Law defines the rights and indicates the steps and the measures to take in charge the patients suffering from an SLD. (Gazzettaufficiale.it, 2010). We also have considered the following Law and their most important articles as reported in Barbera (2012):

- L. 517/77 (*Norme sulla valutazione degli alunni e sull’abolizione degli esami di riparazione nonché altre norme di modifica dell’ordinamento scolastico*, Gazzettaufficiale.it, 2016)
  - Art. 2
  - Art. 7
- L. 59/97 (*Delega al Governo per il conferimento di funzioni e compitalle regioni ed enti locali, per la riforma della Pubblica Amministrazione e per la semplificazione amministrativa*, Gazzettaufficiale.it, 2016)
  - Art. 21
- DPR 275/99 (Miur.gov.it, 2016)
  - Art. 7

- N. MIUR n. 4099/A/4 (*Iniziativa relative alla dislessia*, Hubmiur.pubblica.istruzione.it, 2016)
- N. MIUR n. 26/A/4 (Archivio.pubblica.istruzione.it, 2016)
- D.P.R 122/09 (Gazzettaufficiale.it, 2016)
  - Art. 10
- D.M. 5669/11 (Miur.it, 2016)

The second one is the scientific information reported in the Consensus Conference (2011) an official document realized by the system charged to evaluate and control the health assistance (SiVeAS) with the economic support of the Italian Health Minister. The Consensus Conference respects the standard defined by the Consensus Development Program (National Institutes of Health, 2011) of the US National Institutes of Health (NIH). The authors followed the National System for Guidelines (SNLG, 2009).

## **2.2 The indicators and risk factors of dyslexia**

The first step in the process is the recognition of symptoms: these could be described as a list of observable behaviors, which are different depending on the age of the child. The source of these data of the AID (Italian Association for Dyslexia).

The AID is an association composed of both the parents of dyslexic children, physicians, psychologists, speech therapist, teachers and the dyslexic adult people. With the contribution of a Foundation (belonging to a for-profit organization), the Association has developed a Guideline, addressed to parents. We refer to that because the approach, the mission and the objectives of AID are aligned for to the purpose of the authors. In particular, the Association: 1. Fosters the research and the education in the field (it produces scientific documents and organizes training courses, workshops and seminars on the topic); 2. Is a practical referral point for parents and children involved in dyslexia; 3. It focuses on the Italian context and on “transparent languages”.

The risk factors (from 3 to 5 years old) and the indicators (from 5 to 7 years old and from 7 to 12 years old) are described in the Table 1, Table 2 and Table 3 Annex A.

## **2.3 Instructional Design Method**

Our methodology is based on a rigorous instructional design model (Ronsivalle, Carta & Metus, 2009) to design the Application and to evaluate the results. In particular, we refer to the definition of instructional objectives (Mager, 2004) and the most recent review of the Bloom Taxonomy (Anderson & Krathwohl, 2016). We also refer to the most recent principles of Gamification (Burke, 2014; Stieglitz, Lattemann, Robra-Bissantz, Zarnekow & Brockmann, 2017), integrated with the use of information technologies applied to education (Eisenberg & Johnson, 2002).

Below, we describe the structure of the App according to each phase of the design on a methodological point of view.

*Target – Recipient*

The App is addressed to the parents and the teachers who need more information about SLDs and dyslexia in particular.

*Purpose*

The main purposes of the App is to simplify and to accelerate the process of diagnosis, that requires the teachers and the parents to notice the risk factors or the behaviors and then get in touch with the specialists rapidly.

*Objectives*

According to Bloom Taxonomy, we define the objectives of the App according this tree of didactic objectives, which are described in the Table 1.

**Table 1.** List of didactic objectives of the App

<b>Objective</b>	<b>Level</b>
Contact the main specialists of diagnosis of SLD and dyslexia in the territory	3
Define the term “Specific Learning Disorder”	1
Define the term “dyslexia” in scientific terms	1
Define the term “difficulty” concerning learning	1
List the specific learning disorders (dyscalculia, disortography, dyslexia, dysgraphia)	1
Tell disorder from difficulty	2
List the main causes of specific learning disorders	1
Describe the main features of each learning disorder	1
Define the term “comorbidity”	1
List the possible disorders associated with SLDs and dyslexia	1
List the strong points of SLDs children	
List the risk factors of dyslexia (3 – 5 years old)	1
List the indicators of dyslexia (5 – 7 years old)	1
Distinguish a specific learning disorder from a general difficulty	1
List the main specialist involved in the diagnosis of dyslexia	1
Describe the role of the main specialists involved in the diagnosis of dyslexia (psychologist, physician, speech therapist)	1
Tell each specialist from the other	2
List the Italian regulation for SLDs	1
Describe the main contents of the regulations	2
Describe the main step of the process: from the diagnosis to the compensating strategies	2

List the main association and health structures in the territory to get in touch with in order to obtain more information	1
Locate the main association and health structures in the territory to get in touch with in order to obtain more information	2

*Evaluation tests*

To assess the learning objectives, we provide two elements: the crossword and the Edugame which are described in the Result section.

*Graphic elements*

The graphic elements in the App are quite plain and simple. The graphic structure in the App is an enabler component of the whole design. Considering the fact that the text has to be displayed on a smartphone’s screen (with a resolution of 4,7’’ – 5,5’’) we followed some criteria in planning the App, retrieved by the graphic interface techniques and principles of Gestalt psychologists in the 20<sup>th</sup> Century (Tidwell, 2005).

They described several layout properties to refer to in designing a graphic element:

- *Proximity*: when similar things are put close together they appear to be a part of a whole thing;
- *Similarity*: things of the same shape, size, color and orientation are associated with each other;
- *Continuity*: continuous lines and curves formed by the alignment of smaller elements are better for our eyes.
- *Closure*: simple and closed forms, as rectangles, are better for our eyes. When things are grouped together they appear to be closed forms.

The concepts of the App presented in the paper are drafted with the help of an infographic design app available on the Web.

*Privacy elements*

To use the App, users have to respect the copyright rules. It will be precisely stated that the application is protected by the intellectual property laws and by other applicable provisions including copyright. In Italy, as in Europe, the relevant legislations are the Directive 95/46/CE (Gazzettaeuropea.com, 1995) and the Directive 2002/58/EC (Gazzettaeuropea.com, 2002) concerning the treatment and protection of personal data and the protection of personal life in the sector of electronic communication. We refer to the Guideline drafted from the Federal Trade

Commission for the health-related mobile apps and we used the interactive tool available on the official website (FTC.gov, 2016).

### **3. RESULTS**

#### **3.1 The diagnostic process**

In Italy, the different phases of the taking care, according to Law 170/2010 e Consensus Conference (2010), are:

1. The detection of symptoms
2. The diagnosis
3. The drafting of the Personal Didactic Plan
4. The integration of the teaching assistant
5. The intervention

The recommended path, from the diagnosis to the taking care and the intervention, involves the teacher and the parents as the first ones who can detect the indicators. In this case, the parent has to get in touch with the teacher or vice versa, to collect more information about the clinical situation of the child. By this time the teachers could already implement all the compensatory measures provided to reduce the risk to develop a difficulty in reading or writing later, without a diagnosis of SLDs is involved. If these difficulties last, a Team of specialist of the diagnosis is then contacted. The Team evaluates the situation, provides a diagnosis and defines an intervention project: it agrees with the family to get in touch with the

School staff to integrate educational programs and specific interventions

According to the authors, one of the most important phases of this process is the first one: in fact, with a prompt diagnosis, the child could be sustained with all the measures provided and described in Italy by the Law: a Personalized Didactic Plan (PDP), aimed to adjust the didactic and the assessment tests, a special needs teacher and the compensating and dispensatory tools. Therefore, we believe that communication tools should be easily available to everybody: not only the teachers and the educators, but the family itself.

It is important to adequately prepare the child for the diagnosis, because children often blame themselves for their difficulties. In the Guide drafted for parents dealing with dyslexia (Associazione Italiana Dislessia, 2012), some useful indications for the parents are offered to deal with the process before and after the diagnosis: in general, we can say it is important to be honest with the child and to answer clearly to their questions. The child has to be prepared for what is going to happen, the people he will meet, what he will be asked to do, for how long: in general, the child has to be actively involved in the process. Some further indications after the diagnosis concern the good practice to implement in the daily routine. In this paper, however, we



focus only on the behaviors and not on the psychological dynamics as reported in the Guide: we believe indications as “*Do not blame yourself*” or “*Listen to your son*” may be good practice but too unclear to understand and act alone. So we suggest three main, simple, behaviors a parent could act to positively deal with the situations:

- Reading to and with the child;
- Playing with board games;
- Stimulating him/her with day trip and excursions.

To recap, we suggest to involve the child, to increase the occasion to do an activity together and making her/him feel able to manage the situation.

### *Download and start*

The user should enter in the App Store (through the application on the phone or in the website) to download, free, the App “Discover dyslexia”. In the first screen the logo appears with a welcome text.

### *Privacy and copyright*

On the second screen the user has to accept the copyright rules and the privacy norms in order to keep going with the surfing.

### *The Menu*

The Menu screen is organized in four parts. For each, we define the main headings that the user will find in the App and the words About the contents, we refer to the introduction and the methodology part of this paper and, in particular, to the Tree of Didactic Objectives. It is important to have a simple language in offering the users a description of SLDs and dyslexia, in order to be understandable for non-specialists people: only for the definition and the glossary we consider to use scientific words.

## **Information**

- Definition of dyslexia:
  - Scientific definition of dyslexia;
  - Definition of Specific Learning Disorder;
  - Causes and explanation of dyslexia;
  - Comorbidity factors.
- What is dyslexia and what is not?:
  - Definition of difficulty;
  - Definition of disorder.
- Strong points of SLDs children.

- Laws and official sources:
  - Law 170/2010;
  - The other regulations and norms;
  - The website “Gazzettaufficiale.it”;
  - List of Health association and organization in the Italian territory.
- Glossary.

### **Symptoms**

- List of risk factors (from 3 to 5 years old);
- List of indicators (from 5 to 7 years old);
- List of indicators (from 7 to 12 years old);
- The experts of diagnosis:
  - The physician or the childhood neuropsychiatrist;
  - The psychologist;
  - The speech therapist;
- And now...?
  - How to prepare the child for the diagnosis;
  - After the diagnosis

### **Crosswords**

The crossword is a “completion test”: the user has to complete the crossword with the definition which are provided in the glossary. The user will complete the crossword using the keyboard of the phone. The time is counted and it will be considered for the evaluation score. We consider at least 5 crossword sessions, in order of complexity. In the Figure 2 we describe an example of the screen.

### **Test Yourself!**

#### *The Edugame*

The EduGame is composed by a set of questions and 5 different levels, in order of complexity. Each level collects 5 questions. In total, the player has to answer 25 questions. The user can answer to the questions by acquiring the information collected in the App. The player has to select the first icon to start the game: the other levels are locked until the player has completed the previous one with a score  $\geq 7,5$  (75%). Each level presents a series of questions on a single case: this means that the user has the possibility to concentrate on the test, being engaged in a more realistic and involving situation. This type of assessment should favor a more critical approach in dealing with the problem, supporting a more prudent and questioning behavior.

Below, the structure of the Edugame with a sample of the Quiz 1.1, Level 1.

#### *Description of the situation*

A text with the description of the case is presented. In the sample, in Figure 3, a description of a situation is offered:

*“Maria is a 7 years old child, she is very smart, but lately her marks in Italian language are not so good, compared to her classmates she is very slow in reading and learning new words...”*

#### *Supplementary information*

The user can click on the “plus” button to read more or to obtain new information that are not shown in the text.

#### *Answer and scoring*

Three options are presented. The user has to select one of them. The answers are scored in this way:

- Option a) - right answer: 2 points
- Option b) - wrong answer: -1 points
- Option c) - nor right or wrong answer: 1 points
- No answer: 0 points

In the sample, we would score the answer in this way:

1. I don't know: it is better to talk with the teacher – right answer (2 points);
2. Maybe she is just a little lazy and listless – wrong answer (-1 points);
3. She could be a dyslexic child – nor right or wrong answer (1 point)

It is important to underline that, in the sample, the right answer is that one that favor a more cautious approach, in order to instill a sense of carefulness in dealing with the problem. This is why, in the sample, we favor those answers where the player shows a more cautious approach at the beginning of the game, when it is important to acquire more information rather than giving premature conclusions.

#### *Solutions*

The solutions are presented when the level is completed. A screen with all the answers given is displayed: it is presented the answer given by the player, the scoring and the comment by the developer. If the answer is wrong a screen with the right information is displayed. If the answer it is neither right or wrong, the player could click on the underlined words to open the screen having the useful information to answer properly.

*“Quiz 1.1: - description of Maria.*

*You have answered: “She could be a dyslexic child”.*

*Yes, these could be typical indicators of a Specific Learning Disorder as seen in the list of risk indicators and symptoms. But...be careful! You still do not have all the information to*

*understand what is going on. We suggest you to talk with the teacher to acquire more information about the situation of Maria.*

*Therefore, you have earned **0,5 points** for this question. “*

### *Final score*

The maximum score for each level is 10 (100%). The final score is presented at the end of the questions. In this case:

- If the score is  $\geq 7,5$  (75%) a text with a good feedback appears and the next level is unlocked;
- If the score is  $< 7,5$  (75%) and  $> 6$  (60%) a text with a feedback appears: the player is invited to read again the part of the menu to memorize the information about the topic. The next level is still locked: the system block a new attempt on the test for the next 12 hours.
- If the score is  $< 6$  (60%) a text with a feedback appears: the player is invited to explore the app and reading the section “information” and “symptoms” before attempting the assessment test. The next level is still locked: the system block a new attempt for the next 24 hours.

The maximum score for the whole assessment is 50/50 (100%). The rules for the feedback are the same:

- If the score is  $\geq 37$  (75%) a text with a good feedback appears;
- If the score is  $< 37$  (75%) and  $> 30$  (60%) a text with a feedback appears: the player is invited to read again the part of the menu to memorize the information about the topic.
- If the score is  $< 30$  (60%) a text with a feedback appears: the player is invited to explore the app and reading the section “information” and “symptoms”.

### *Economics*

The App should be completely free for the user to download.

## **Conclusion**

In SLDs the diagnosis is the first step in the taking care process. However, both lacking information and emotional resistances may hamper the process of diagnosis, starting from the acceptance of their child or pupil dealing with a specific learning disorder. On one side, teachers could be unprepared on the topic and it may be difficult to pay close attention to every pupil of the class. Then, even if a teacher detects a problem, the relation with the family could be complicated. Finally, teachers should be informed about the further steps, to help the family in this process. On the other side, parents may feel different emotions (shame, guilt, embarrassment) in dealing with the problem and may be uncertain in talking with the teacher,

avoiding the problem. Nevertheless, people are more and more inclined to look for medical information on their own, without a medical guidance. This behavior has also negative consequences and it does not help the person to contact the specialist faster, actually.

Our proposal is to build a web tool (an Application for smartphone and tablet) able to inform the users in a scientific way, but respecting scientific criteria. The App is structured in four parts: 1) Information, 2) Symptoms, 3) Edugame and 4) Crosswords.

In the information section we provide scientific information about SLDs and dyslexia, helping the user to clarify the more ambiguous areas on the topic (comorbidity factors, causes and differences). Then we provide a list and a summary of the main Italian regulations to recognize their rights. We also consider listing the main association and organizations in the territory to help the stakeholders orienting in the process, starting from the contact with the school and the medical staff. We describe the main risk factors and indicators, but we also offer a list of strong points to help parents and teachers to know the positive side of the learning disorders, using them as a lever for learning strategies. We refer to a rigorous instructional design method, defining the objectives and the evaluation tests according to the scientific literature on the topic. The Edugame and the Crosswords are built on the tree of didactic objectives: the scoring ratio favors a more cautious approach in dealing with the problem, as we reward those answers which are not too sharp and deterministic. In fact, the App is not meant to make users able to diagnose an SLD but to speed the taking care process, starting from involving the persons who are in close relation with the child. To build the contents, in the methodology part, we refer especially to the Italian literature, because the dyslexia presents some peculiarities in the transparent languages as Italian. Finally, we both defined the privacy and copyright policies.

The App wants to be a practical guide, especially for parents. However, this is only a design, consequently we do not have any quantitative data about the real effectiveness of the App in catalyzing the process. A further research should involve both programmers, graphic designers and health professionals to build this application, following the guidelines and the indications provided in the paper.

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**ANNEXES**

**ANNEX A**

**Table 1.** Risk indicators of SLD and dyslexia from 3 to 5 years old

<b>RISK INDICATORS for 3-5 years old children</b>
<b>The child...</b>
... Produce the first words over 18 months of life and/or the first phrases of 2-3 elements, over 30 months
... Pronounces bad words and / or words formulates very short and / or incorrect phrases when speaking
... Replaces some sounds in words, so when speaks his language is not understandable to people which are not familiar.
... Has difficulty in recognizing the sounds that make up one word and can confuse them.
... Has difficulty in dividing the word into syllables (syllabic analysis) and / or in rebuilding the whole word from syllables (syllabic synthesis).
... It may misunderstand what you hear.
... It delivers inappropriate words to the context or replaces them.
... It tends not to remember lists (names, things, numbers) especially if in sequence.
... Has difficulty in recognizing and / or learning rhymes or words with assonance
... It has difficulty keeping the rhythm
... Has difficulty remembering the proper name of the objects.
... It is slow to expand vocabulary.
... Has difficulty in learning the numbers, days of the week, colors and shapes.
... He has difficulty learning to write his own name.
... He has difficulty in following more indications together and routine.
... He has difficulty with tasks involving motor skills (to tie shoes, cut out, thread beads...).
... He may seem uncoordinated and clumsy in movements when he is playing or is engaged in sports activities.
... Later, from 3 years old, he pronounces bad words and / or words formulates very short and / or incorrect phrases when speaking.
... Replaces some sounds in words, so when speaks his language is not understandable to people which are not familiar.

*Source: AID, 2012, pp. 17-18*

**Table 2.** Symptoms and indicators of SLD and dyslexia from 5 to 7 years old

<b>INDICATORS for 5 – 7 years old children</b>
<b>The child...</b>
... Slowly learns and stabilize correspondence between letters and sounds.
... Has difficulty separating the word into sounds (phonemic analysis) and to rebuild the word from sounds (phonemic synthesis).

... Has lower reading and writing capacities compared to his/her intellectual vivacity.
... His performance school is mediocre, especially in writing tests.
... Learns quickly through observation, the demonstration, experimentation and visual aids
... Has difficulty reading single isolated words.
... Hesitate in reading a word fluently, especially if it is new.
... Hesitate in recognizing short words.
... Forgets some letters and/or place them in the wrong order, during writing.
... Reads slowly, without any expressiveness and with little fluency
... Has more difficulty with prepositions (for, on, on) than with content words
... Tends not to remember lists (names, things, numbers...) especially if in sequence.
... Has difficulty in verbalizing his thoughts.
... Has difficulty in understanding what he/she reads.
... Understands long texts better than individual words.
... Understanding is better when listening to someone who reads when he reads it.
... Has difficulty planning and organizing.
... Has difficulty reading the clock.
... He sees words moving or distorted during reading.
... Seems to have visual problems that standard tests do not detect.
... May have difficulties with tasks involving motor skills.
... Has difficulty tapping his shoes, knotting, dressing.
... Has difficulty copying or summing up correctly.
... Holds pencil and pencil clumsy.
... His writing could be illegible.
... Uses the finger to count.
... Can't tell right from left, the order of the days in the week, of the months in the year...
... Has difficulty in counting the objects, but he can list the number

*Source: AID, 2012, pp. 18-20*

**Table 3.** Symptoms and indicators of SLD and dyslexia from 7 to 12 years old

<b>INDICATORS</b>	
<b>Age</b>	<b>7 – 12 years old</b>
<b>The child...</b>	
... Has lower reading and writing capacities compared to his/her intellectual vivacity.	
... Keeps confusing the sequence of letters inside some words.	
... Has no reading accuracy, speed and smoothness they undermine understanding.	
... His spelling is inappropriate for the age (e.g reads or writes differently the same word proposed several times in the same text; omits, inverts, replaces letters).	
... In writing, uses a limited vocabulary.	
... Can't use their own notes to study.	
... Looks for excuses to avoid reading.	
... Has linguistic difficulties in mathematics (e.g. when reading the problems, confuses	

numbers and symbols).
... Can not learn the tables.
... Confuses right and left.
... Tells the facts (events, stories) adding little details and in a long time.
... Has difficulty in figurative language (proverbs, common saying).
... He takes or does not transcribe homework.
... Has difficulty in remembering what day or month is it.
... Has difficulty using the school diary.

*Source: AID, 2012, pp. 20-22*

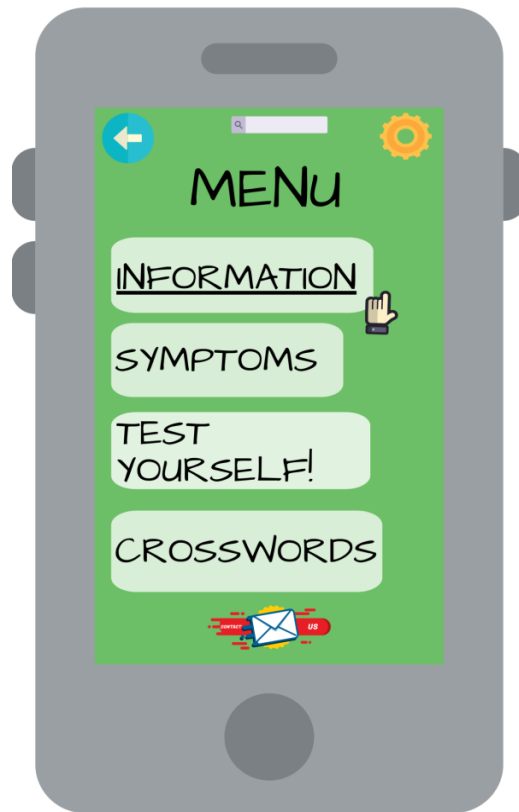
## ANNEX B

In this section the graphic elements concerning the logo, the menu, the edugame and the crossword are presented.

**Figure 1.** – The welcome screen and the log



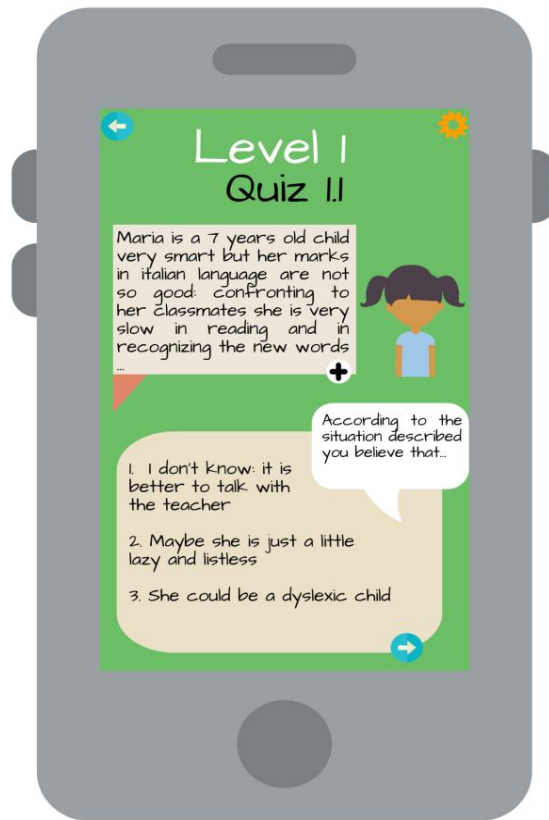
**Figure 2** – The Menu screen and the description of each voice



**Figure 3.** The crossword: a sample



Figure 4. The Edugame – Quiz 1.1, Level 1



**A STUDY OF THE INFLUENCE OF WORK BASED LEARNING (WBL) PLACEMENT ON  
ACADEMIC PERFORMANCE OF COMPUTER SCIENCE AND INFORMATION SYSTEMS  
STUDENTS**

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**Abstract**

The computing programmes in almost all Universities faced criticism in terms of their coverage especially about meeting the needs of industry. Many employers complained that the programmes of study do not teach what is required in the industry. The problem is not uncommon to the computing programmes offered by the University of Mauritius (UoM). There has been a strong move by the UoM to integrate WBL placement in the programme of studies to address the skills mismatch problem meeting the changes experienced in the employment patterns which make Computer Science and Information Systems graduates' skills highly valued. WBL placement was incorporated as sandwich programme organised over full-time work experience which involves full-time learning at work settings. WBL placement has been identified as a means of responding to the needs of employers making students fit for purpose and practice. Employers recruiting Computer Science and Information Systems students view WBL as vital in developing students into professional workers. While research confirmed that the WBL placement enhances employability of Computer Science and Information Systems graduates, its impact on academic performance of students is still being much questioned today. Some studies expressed that there is a causal link between improvement in academic achievement after the completion of an integrated WBL placement, others did not find much correlation between the two entities. Most studies carried out so far have based their investigation on anecdotal evidences or on sample which are rather small involving students from only a single field of study. This paper aims to examine the relationship between the two entities, placement and academic achievement, based on a concrete sample of undergraduate students studying from two fields Computer Science and Information Systems and who have experienced similar WBL placement. A comparative statistical analysis was carried out on students who did or did not undertake a WBL placement, their class of degree achieved was investigated. Secondary data was used where the degree classification obtained at the end of studies were analysed from four cohort of students graduating after three years of full-time study. The results revealed that there is a significant difference in academic performance of WBL students compared to those who have not undertaken WBL placement during their studies. It was found that students who undertook the WBL training graduated with better degree classifications. The paper concludes that work placement has a positive influence on the academic performance of students in the Computer Science and Information Systems fields.

**Keywords:** skills, work experience, academic achievement, training

## 1. Introduction

Computer Science degrees are among one of the fastest growing fields offering students with various opportunities to secure employment immediately after graduation. Yet, employers complain that there is mismatch between the academia and the needs of the industry. Many Universities offering degrees in Computer Science and Information Systems focus on the elements of programming as major and core subjects where students spent time learning to program on several platforms. Yet the practice of programming on campuses is found to be inadequate. [1] explained this situation as the “expectation gap” referring to the difference between what is considered important skills by the industry and those taught in academia. [2] expressed more severe criticism pointing out that the examples given in Computer Science courses do not resemble to what is practiced in the industry at all. [3] on his side called it the “skill gap” and stressed particularly on the absence of teaching important skills needed for work in the IT industry. There is need for students to step in the world of work experiencing real world situation to grasp further knowledge for making them fit for purpose and practice. To bridge the gap between the academia and the world of work, UoM offered its Computer Science and Information Systems students the possibility of undertaking WBL practice at the end of each year of study where students spend short period of training (two months) to acquire additional knowledge and skills from real work situation. WBL encompasses learning which links-specific experience in the workplace with the computer science course content provided by UoM. This involves the acquisition of knowledge, skills and attributes for the development of much needed core competencies for Computer Science and Information Systems students at the undergraduate level. WBL placement provides a vehicle for the transformation of knowledge through its use in a real-life setting [4]. The correlation between WBL training and employability of Computer Science graduates is quite comprehensive as regards to benefits [5], [6]. But there exist a dearth of literature about the correlation of WBL and academic achievement. It is still questionable whether the transferable skills developed on work practice, feed back to academic study and contribute towards better performance.

## 2. Literature review

[7] sought to investigate how placement affects academic performance and employment rates. They found that placements were more likely to be successful where universities consistently encouraged students to reflect on their learning and achievement. They did not give clear evidences as to whether WBL placement influences academic performance. Studies have also been carried out involving other fields of study, for instance [8] conducted a study where he analysed the examination results related to two cohorts of business undergraduates. He found no significant difference between those who undertook a placement and those who did not take a placement. [9] anecdotally found that “*students on their optional bioscience sandwich degrees benefit academically from placement experience*”, but there was inadequate supportive evidence of this in the literature. They used multiple regression analysis to confirm that students taking a sandwich placement have a slightly better academic performance in their final year with an average of 4% more as compared to students without any placement.

On the other hand, [10] made a comprehensive study of students from the field of economics at the University of Surrey and provided evidence that completing a placement significantly increased the opportunities of obtaining a better degree classification. However, he used



working variables that might otherwise reduce the belief about such correlation. He based himself on factors such as A-level subject choice and nationality, which did not reflect current status of the students while they were studying at university. His study did not attempt to explore other variables that would contribute to the increase in performance.

[11] on his side found out that there was little connection between placement experience and the academic performance. However, [12] added to the research on the effect of placements on academic performance. The majority of undergraduates in their study reported that their intellectual and personal development have improved through placement and that their level of confidence and motivation have been enhanced to continue their studies with more serenity. However, there was no further evidence that the enhanced confidence and motivation led to brighter academic performance as output.

[13] studied the academic performance of engineering students over three years and concluded that there was a causal link between placements and improved academic performance. However, he himself addressed the limitation of his study by explaining that the sample size he used was too small. In fact, he compared 40 students who have undertaken a placement with 40 others who have not undertaken any kind of placement. [14] agreed that completing a full year on WBL practice improved the degree classification, but clearly mentioned that it was not the placement year, which led to a better degree, rather it was the previous academic performance.

[15] conducted a study based on a sample of students who have completed their degree in Business Administration. They used an estimation model which revealed that placement students did approximately 3.5% better than non-placement students in their 2<sup>nd</sup> year of studies and have a slightly better improvement of 4% in their final year. They found that the difference between the 2<sup>nd</sup> and 3<sup>rd</sup> year was however not statistically significant. While the study confirmed that undertaking a placement year has a slight impact on the degree performance, the authors stated that there are many limitations to their study since the data used come from only one course of study, which might not reflect same for other courses. Secondly, they assumed that a better placement essay, for example, an employer evaluation means a better placement that is there was no uniformity on the assessment process and thirdly they recognised that there might be variability of the learning opportunities offered by the different placement providers. They agreed that their findings however form the basis for further work.

In addition, [16] in their study stated that the assumption of WBL practice leading to better performance from previous studies appeared to be based predominantly on anecdotal evidence as opposed to any systematic data analysis. They conducted their study based on two cohorts of students studying Computer Science and Information Systems where the students had options to complete their studies over three years without placement or four years with one-year placement. They concluded that 58% of those students who had been on a work placement achieved an upper second or first class degree, whereas only 37% of non-placement students achieved the same academic standards. However, the conclusion reached was seen to have limitations as the length of study for both groups were not the same, one being a three year programme, the other was of four year duration. It has been observed in general at many universities that students having four-year programme (which may be without placement component) developed more maturity than those having three year programme and thus performed better in the final year.

The evidence brought forward by this study is still questionable, as better results might be coming from the fact that the four-year students were more mature rather than the fact that they have opted for one-year placement. The authors acknowledged that their findings could be used as a starting point and there is need for further research that would involve investigating different cohorts of students and in different subject areas. In fact, this is one of the objectives of what this research study attempts to investigate.

### 3. Research methodology

To investigate whether WBL practice influences academic performance of Computer Science and Information Systems students, there was need to consider secondary data about students' performances. [17] stated that secondary data are data that are gathered by someone else (e.g., researchers, institutions, other NGOs, etc.) for some purposes other than the one currently under consideration. The class of degree remains the predominant concern for students [18]. A comparative analysis was carried out on the classification of degree level obtained by Computer Science and Information Systems graduates who have undertaken WBL during their studies against those who have graduated without doing any WBL training. Secondary data of students were compiled from students who graduated over the last four years from the cohort of 2010, 2011, 2012 and 2013. Anonymity and confidentiality of students results were ensured in the research. Data were treated in strict confidentiality and no reference had made to any individual student.

### 4. Results and discussion

The quantitative data were analysed by considering the degree classification of the four cohorts mentioned above. Each cohort consisted of students coming from Computer Science and Information Systems graduates. For the purpose of the study, only students who were awarded the honours degree were considered excluding those exiting at Diploma or Certificate level or at Pass level for the degree. Table 1 shows the number of students who were graduated with the WBL training classified as 'WBL Students' and those graduated without taking any WBL module classified as 'Non-WBL Students'. It is to be noted that students classified as 'WBL Students' in the table had undertaken at least one WBL module during the course of their studies.

**Table 1: Number of students graduated over the four cohorts**

Cohort	Field	WBL Students	Non-WBL Students
2010	Computer Science (CS)	12	55
	Information Systems (IS)	6	43
2011	Computer Science (CS)	34	48
	Information Systems (IS)	16	28
2012	Computer Science (CS)	20	55
	Information Systems (IS)	26	35

Cohort	Field	WBL Students	Non-WBL Students
2010	Computer Science (CS)	12	55
	Information Systems (IS)	6	43
2011	Computer Science (CS)	34	48
	Information Systems (IS)	16	28
2013	Computer Science (CS)	9	22
	Information Systems (IS)	18	29

Table 2 shows the representation of students for both Computer Science and Information Systems with their degree classification over the four cohorts. It was observed that the percentage of students who obtained 'First Class' and 'Upper Second Class' was higher for students who had completed WBL as compared to those who had not undertaken. There are more non- WBL students who was awarded 'Lower Second Class' and 'Third Class' degree as compared to those who have completed the WBL training.

**Table 2: Degree Classification over the four cohorts**

		Degree Classification			
		Third Class	Upper Second Class	Lower Second Class	First Class
Students	No WBL	15.87%	46.67%	27.30%	10.16%
	WBL	13.48%	44.68%	31.20%	10.63%

The data was analysed in further depth by considering the following hypothesis:

$H_0$ : There is no significant difference in academic performance between WBL students and non-WBL students.

$H_1$ : There is a significant difference in academic performance between WBL students and non-WBL students

The academic performance was measured by considering the degree classification obtained by students at the end of their studies. A weight was assigned to the degree classification. "100 marks" was allocated for the First Class degree and "80 marks" for the Upper Second Class and so on as shown in Table 3. Similarly, a score "1" is assigned to students who have not done WBL and score "2" is allocated to WBL students. The data was tested based on the secondary

data compiled for the four cohorts which involved a total of 456 students over the four years out of which 141 students have completed at least one WBL module during their studies.

**Table 3: Degree Classification weightage**

Degree Classification	Weight
First Class	100
Upper Second Class	80
Lower Second Class	60
Third Class	40
Pass	20
Diploma	10
Certificate	5

**Table 4: Descriptive Statistics for Degree Classification**

	Mean	Variance	Skewness	Kurtosis
WBL Students	67.80	290.13	0.21	-0.52
Non-WBL Students	66.35	295.87	0.31	-0.49

Descriptive statistics was carried out and the results are as shown in Table 4. The mean of WBL students being higher provides indication that students who have done WBL have a better degree classification. Positive values of skewness were observed for both categories and the data were found be approximately symmetric being in the range of -0.5 and +0.5. It was found that the Degree Classification does not follow a normal distribution at 5% significance level as under both tests  $p = 0.000 < 5\%$  for both WBL and Non-WBL students.

As the degree classification was not normally distributed, Mann-Whitney was used to test the above hypotheses

$$H_0: \mu_{WBL} = \mu_{NonWBL}$$

$$H_1: \mu_{WBL} > \mu_{NonWBL}$$

where  $\mu_{WBL}$  = median value of degree classification for WBL students

$\mu_{NonWBL}$  = median value of degree classification for Non-WBL students

**Table 5: Ranks of Degree Classification**

	Students	N	Mean Rank	Sum of Ranks
Degree Classification	WBL	141	236.25	33311.50
	Non-WBL	315	225.03	70884.50
	Total	450		

**Table 6: Test Statistics**

	Degree Classification
Mann-Whitney U	21114.500
Wilcoxon W	70884.500
Z	-.899
Asymp. Sig. (2-tailed)	.036

$Z = -0.899$  and  $p\text{-value} = 0.036 < 5\%$ , indicate that  $H_1$  should be accepted. Therefore, the test confirmed that there was a significant difference in academic performance of WBL students compared to those having not done any WBL practice during their studies. Higher mean rank for WBL students from Table 5 further confirmed that WBL students obtained better degree classification. The result demonstrates that students completing WBL do achieve higher degree classification as compared to Non-WBL students.

Investigation was also been carried out as to whether among students who completed the WBL placement, there is any difference in academic performance of Computer Science to that Information Systems students. The following hypothesis was tested:

$H_0$ : There is no significant difference in academic performance between Computer Science and Information Systems WBL students

$H_1$ : There is a significant difference in academic performance between Computer Science and Information Systems WBL students

**Table 7: Descriptive Statistics for Degree Classification of WBL students**

	Mean	Variance	Skewness	Kurtosis
Computer Science	72.53	289.44	-0.13	-0.53
Information Systems	62.42	240.18	0.60	0.41

Descriptive statistics was carried out and the mean of Computer Science students was found to be higher than Information Systems students. It was found that the Degree Classification does not follow a normal distribution at 5% significance level as  $p = 0.000 < 5\%$  for both Computer Science and Information Systems WBL students.

As the degree classification was not normally distributed for both Computer Science and Information Systems students, non parametric test, Mann-Whitney was used to test the above hypotheses

$$H_0: \mu_{CS} = \mu_{IS}$$

$$H_1: \mu_{CS} > \mu_{IS}$$

where  $\mu_{CS}$  = median value of degree classification for Computer Science (WBL students)

$\mu_{IS}$  = median value of degree classification for Information Systems (WBL students)

**Table 8: Ranks of Degree Classification**

	Course	N	Mean Rank	Sum of Ranks
Degree Classification	CS	75	82.17	6163.00
	IS	66	58.30	3848.00
	Total	141		

**Table 9: Test Statistics**

	Degree Classification
Mann-Whitney U	1637.000
Wilcoxon W	3848.000
Z	-3.698
Asymp. Sig. (2-tailed)	.000

Mean Rank for Computer Science students were observed to be higher than Information Systems students from Table 8.  $Z = -3.698$  and  $p\text{-value} = 0.000 < 5\%$ , indicate that  $H_1$  should be accepted. Therefore, the test confirmed that there is a difference in academic performance of

Computer Science students as compared to Information Systems students. Computer Science students who completed WBL training perform better than their fellows in Information Systems.

## 5. Conclusion & recommendation

The study demonstrates that WBL practice influences the academic performance of Computer Science and Information Systems students. Students doing WBL practice were seen to have better opportunities to obtain a First Class as compared to those who did not undertake the WBL training. Exposure to real work experience enhances the students' knowledge and allows them to foster better practical skills which contribute to better performance. WBL is seen to be a good contributing factor in making students achieve higher academic standard. [19] confirmed that WBL provided an excellent platform from which students could progress to the workplace and seek further opportunities for their development. The progress made during practice is found to be beneficial for students after returning from placement. Curriculum for Computer Science and Information Systems programmes must make room for work placement. [20] stresses that the Information Technology curriculum must count for practices as well as descriptive knowledge. It must include training as well as general education. This study confirmed the study conducted by [16] in 2012 where they provided evidences that work placement really does have a positive impact on the academic achievement of computing students. However, this study has not assessed the academic capability of the students before undertaking WBL training. No investigation was made about whether the students who undertook work placement were better students prior to the WBL training. Further research needs to look into the academic capability of students prior to placement.

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**Utilization of Arts in Social Work Practice:  
A Review of the Literature**

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**Abstract**

Utilization of Arts in Social Work Practice: A Review of the Literature uses multidisciplinary findings to provide an insightful perspective into the usage of various innovative artistic ideas within the field of social work practice. It provides brief examples of evidence-based and traditional art techniques that can be utilized in micro, mezzo, and macro level social work.

**Key Concepts**

Arts, social work practice, literature review, healing artistic ideas, evidence based art form

**Introduction**

A growing body of literature examines the use of art in the social work profession, its place in micro and macro practice, and the methods most conducive to client engagement. "Art" is a general and vague term, referring to everything from the profession being a form of art in and of itself, to visual arts, to individual and collective roles of art (creators, spectators, participants). According to the American Art Therapy Association (2013), art therapy is practiced in various settings from private practice to public institutions and community settings.

Social work is concerned with addressing the needs of individuals, groups, and communities. Therefore, social work professionals are exposed to numerous and varied issues, from micro to macro levels. Therefore, if we are to view the social work profession as art, Gray and Webb (2008) offer a professional definition, which highlights the relationship between art, truth, and event with a purpose of serving others. Social workers themselves are artists. Art refers to those artistic methods used in the micro and macro settings to evoke different outcomes. Thus, art (in its variety of definitions and contexts) is extremely powerful in social work as it represents the capacity to foster

human expression, document human experience, and give voice to those perspectives, which are most often marginalized or ignored (Cleveland, 2005).

Moxley, Calligan-Feen, and Washington (2012) eloquently address the different levels by which art can positively influence and can be used to promote social work values. Exposure to the arts can facilitate the cognitive, cultural, and emotional development of social workers so that they are both comfortable with and prepared to use creativity as a problem solver when appropriate. The use of arts can lead to collaboration between social workers and professionals from other disciplines who use art as a method for addressing the social issues, which they face every day. Social work educators can integrate art into social work curriculums to facilitate the processing of student emotions, as well as the difficult issues, which they are training to help clients face (Moxley et al., 2012).

### ***The Influence of Art in Social Work Practice***

From the beginning of social work practice, scholars have debated whether the profession uses science or art, but the combination of both is what allows social work to remain crucial in today's society. Arts have emerged as a medical remedy and soul medicine for those who need it (Mcniff, 2013). [\*Art as medicine: Creating a therapy of the imagination\*](#) by Shaun McNiff continues to state through artistic expression and reflection the body's chemistry does indeed change. Recognizing the clarity that art gives to individuals as an expressive act alone, or a reflective tool with a group or therapist creates an awareness of how broad the term art can be. Some say, the early antecedents of art used for therapy can be traced back to the 1940's in the UK where Adrian Hill personally saw use in art helping deal with tuberculosis, and further valuing creativity, self-expression, and being non-judgmental (Case & Dalley, 2014). Others recognize C.G. Jung's contribution in the early 1900's showing how art was used with patients in psychiatric wards or a history of psychosis (Killick & Schaverien 2013). Art is being used within large institutions and out in the community. Understanding the wide outreach of art in many fields allows the researcher to speak to the depth of influence art currently, has on social work methods.

Generally speaking, the role of art within the helping professions such as medicine, general healthcare, special education, and occupational therapy, is similar to the role it has taken in micro social work and psychology – a means of providing therapy for those suffering from psychological trauma, as a channel for self-expression and a form of communication, a means of promoting well-being and self-esteem. Although the role of art may take similar form across disciplines in the helping professions, its versatility is apparent in how it is used to achieve aims specific to different disciplines.

***Art across Social Work Methods – Micro Macro Phenomenon***

Although there is little research and funding focused on the effects of art as an intervention in the clinical setting, social work professionals are integrating art methods into their work with clients. On the micro side of the social work spectrum, therapists host group art therapy sessions in and hang client artwork on the walls to engage clients in conversation, as well as combat feelings of isolation (Ball & Gross, 2014). Including art as part of the therapeutic process allows individuals to creatively explore ultimate concerns of human existence (Rubin, 2016). Humans are social beings, and using art in group sessions allow them to connect, reflect on the personal journey, become aware of other stories, or work together through the process to share and learn (Case & Dalley, 2014).

Arts education is a method, which bridges the micro and macro, as both the incorporation of art into formal education curriculums, as well as the creation of informal, community-based arts education programs can facilitate youth social engagement. Using art techniques in the macro fashion can allow communities to adapt and integrate (Rubin and Babbe, 2016). Bringing individuals together in guided or open-ended art expression projects can help individuals foster a sense of self while understanding how they belong in the larger community. For instance, Hirzy (2011) discusses a particular model, which art educators often incorporate as a guide for engaging teens and adolescents entitled the *Excellence on Stage and in Life: The Mosaic Model for Youth Development through the Arts*. The Mosaic Model focuses on three outcomes: skills, which include arts discipline and skill, academic achievement and employability; self, which includes the development of a positive self-image, high self-expectations, and ambitious goal-setting; and society, which includes respect for diversity, community involvement, and positive social capital. There exist multiple benefits for teens who engage in high-quality arts education programs that incorporate youth development practices. For example, arts education out of school, combined with youth development practices allows teens to wield more power, make rules and take risks in trying new things, and create new combinations of people, materials, and ideas (Hirzy, 2011). Catterall, Dumais, and Hampden-Thompson (2012) demonstrate that arts engagement by teens is linked to higher test scores in science and writing, completion of calculus courses, higher GPAs, higher graduation rates, and higher aspiration to attend college and higher enrollment in competitive, four-year colleges. Additional core impacts of direct participation in art making include developing an individual voice, leveraging of life skills, and creating a sense of community and belonging in the immediate art community as well as within greater society (Hirzy, 2011).

In social work, artistic tools and methods used in the macro sector of the profession range depending on the objective. For instance, the American Planning Association (n.d.) identifies storytelling and visual arts as being effective tools for understanding and exploring community values, for increasing stakeholder involvement, and for facilitating better engagement in

community and urban design projects. “A body of evidence has been developing in social work which shows that crossing boundaries between the social sciences with the arts and humanities can help to communicate service users’ and carers’ experiences more powerfully” (Hafford-Letchfield et al., 2012). Visual art techniques such as drawing, painting, and sculpting are used in planning workshops and meetings to illustrate difficult concepts, whereas storytelling is utilized to enhance communication and collective listening. Creating an avenue to communicate verbally with metaphors or non-verbally with drawings promotes open communication among people (Edwards, 2014). Public galleries and exhibits, performances and the inclusion of art in school curricula facilitate better public engagement and stakeholder investment (both formal and informal) in those communities. Art contests, public design workshops, and collective, public space revitalization serve as a means of connecting every day users to the spaces, which they use (American Planning Association, n.d). Walton (2012) attempts to theorize an art-based method in social work education; she suggests incorporating visual arts in social work curricula as a means of enhancing comprehension of social work concepts. In her evaluation of the available literature on the use of visual and sensory methods in social work, Walton (2012) discovers that in the profession’s attempt to express and develop an understanding of itself, the methods primarily relied upon are talk and text. Moxley et al. (2012) discuss the incorporation of studios as a method of teaching creativity through practical application. The studio environment is one conducive to the conceptualization and planning of creative solutions and responses, as well as interdisciplinary collaboration and innovation (Moxley et al., 2012; Schon, 1986; Johnson, 2010).

Charpentier and Neel (n.d.) have compiled an extensive and ongoing workbook, which provides a variety of exercises and methods for social practice. Exercises range from creating a communal cookbook to art exercises, which aid in spurring conversations around racial inequality and privilege. This modality of community art allows social workers to connect with those from different backgrounds as well as different levels of ability (Waller, 2014).

The wider social work system depends on the human connection stemming from spirituality and arts (Payne, 2014). Connecting with individuals or a system of individuals, social workers are using visual methods in spheres ranging from social work education to facilitate healing in direct practice, to promoting community engagement on the macro side. However, there lacks a cohesive body of literature, which provides evidence as to which visual arts methods are most appropriate for the diverse range of social work realms (from micro to macro). Walton (2012) in her attempt to identify explanations for the effectiveness of the visual arts method in social work education, simultaneously identifies the gaps currently in existence, as well as outlines next steps for the social work field in incorporating visual arts as an evidence-based method: 1) provide evidence as to the apparent effectiveness of the visual-artistic method in social work, and 2) define a theoretical base, which will aid in shaping research and development plans.

### ***Art across the life cycle***

Micro social work is particularly concerned with treating individuals holistically. Holistic care, in this case, means taking into account all of the factors, which contribute to an individual's development – development across all life stages, environmental factors, and the micro, mezzo, and macro circumstances influencing their daily functioning. The National Endowment for the Arts (2011) reports that the arts are ideally suited to promote an integrated approach, which reaches individuals across different stages of the life cycle, across generations, and in various learning environments. Research on the influence of art reveals the following outcomes: strong connections between arts learning and education and improved cognitive development; contributions to school-readiness for children; positive academic and social outcomes for at-risk teenagers who receive arts education; added ability to contribute and problem solve for young adults who engage in art activities; and improvements in cognitive function and quality of life for older adults who participate in arts and creative activities compared with those who do not participate.

More specifically, compared to a regular Head Start control group, children three to five years old from a low socioeconomic background who received music training showed gains in nonverbal IQ, numeracy, and spatial cognition; students from low socioeconomic backgrounds who attended an arts enrichment preschool demonstrated improved skills in school readiness (Neville, Andersson, Bagdade, Bell, Currin, Fanning, Klein, Lauinger, Pakulak, Paulsen, Sabourin, Stevens, Sundborg, Yamada, 2008; Brown, Bendett, & Armistead, 2010).

Adolescents with low socioeconomic status who were engaged in the arts (in some capacity) are more likely than their peers to attend college, gain employment, volunteer, and participate in civic activities such as voting; attendance, student behavior, and student academic achievement improved for students who were enrolled in a school, which incorporated an arts integration initiative (Catterall, 2009; Pittsburgh Public Schools ca. 2008).

Young adults are at a vital point in life where every decision seems like it defines their future. Art helps young adults respond to diverse problems, opportunities, and changes they experience on a daily basis (Landgarten and Lubbers, 2013). Engaging in art activities can help increase awareness to surrounding social justice issues, while also helping in a one on one therapy sessions. It has also been shown that those involved with the evolving world of art are more likely to contribute new ideas, techniques or theories (Ericcson, 2014).

Older adults who were engaged in a chorale program reported higher physical health, fewer doctor visits, less medicine use, fewer health programs, and fewer instances of falling. Older adults who were engaged in a theatrical intervention for at least four weeks improved in immediate work recall, problem-solving, verbal fluency, and delayed recall in comparison to two controls. Older adults with different dementia illnesses who were engaged in storytelling

interventions were more alert and more engaged than those in a control group (Cohen, 2006; Noice & Noice, 2009; Fritsch, 2009).

### ***Healing aspects of Art***

A growing body of literature supports the use of art as an intervention to facilitate healing (Ball, Gross, 2014; Lyles Levy, 2014; Heenan, 2006). Heenan (2006) concluded the positive outcomes of integrating art interventions in a clinical space as spurring improvements in self-confidence and self-esteem for clients. Ball and Gross (2014) discuss the contributions art engagement can have in decreasing stress and increasing feelings of relaxation and reducing anxiety. Art is seen as a therapeutic factor reducing depression by promoting personal change having those individuals create and then verbalize (Blomdahl et al., 2013). At the Seventh Annual Women's Symposium at Fordham University, a panel of social workers speaking at the Graduate School for Social Services shared findings, which focus on the role of art in facilitating expression for clients. "Whether it is visual arts, writing therapy, poetry, drama therapy or movement, there is less resilience on verbal language...If you are really traumatized, language is not how you express yourself very well anyway – you are in shock...So [arts therapy] is a strength-based model...The focus is on resiliency versus pathology" (Bennett-Pagan, 2015).

The existing research connects art and positive outcomes for clients exhibiting and struggling with a range of issues, and which spans the micro to macro spheres of social work. Research and funding in this area are limited. The profession is calling for increased funding and research on the effect of art as an intervention on the mental health status of clients.

### ***Community-Based Art***

According to the varied and relatively recent body of literature, art appears to hold a particular role in the development, strengthening, and engagement of communities. "When local communities face conditions of physical and economic hardship, human creativity is the most valuable, dependable, and limitless resource on which they can consistently rely for positive renewal" (Pearson, 2002; p. 5). Formally, the United States is home to more than 21,750 non-profit arts, culture, and humanities organizations, holding approximately \$37 billion in assets and spending \$13.3 billion annually (Seguaro Seminar on Civic Engagement in America, 2000). Additionally, there exist tens of thousands of groups referred collectively as the "unincorporated arts," which are comprised of a range of informal arts groups ranging from church choirs to poetry slams and hip-hop groups.

Art holds a powerful role in reviving poor, minority, and disadvantaged neighborhoods by providing means of promoting interaction, increasing and broadening civic participation, engaging youth, and promoting the power and preservation (Moxley et al., 2012; Borrup, 2007) Sinding et al., (2012) Pearson (2002) asserts that in order to succeed in providing positive

renewal to disadvantaged communities using art, requires the work of committed, innovative, and locally engaged professional who are able to transform local creativity into a means of real, positive action and change.

Art, for the purposes of this section, refers to cultural projects as artistic expression and civic institutions (i.e., museums, public galleries, community art organizations, performance art institutions, and arts councils and public arts organizations) based in artistic expression and work (Borup, 2007). The foundation of research concerning the effect of art on community development and engagement is founded on the research conducted by Sampson, Raudenbush, and Earls (1997), in their fifteen-year study of neighborhoods across Chicago discovered that it was not wealth, access to resources such as healthcare, or crime, which defined the levels of health of communities. Rather, Sampson et al. (1997) purported that it was “collective efficacy,” or the capacity of people to act together on matters of common interests, which defined the levels of health and well-being of neighborhoods. The National Endowment for the Arts has issued multiple reports, which strive to measure and record the influence of art on the economic health and civic engagement of communities. The Saguro Seminar on Civic Engagement in America (2000) promotes civically desirable values and characteristics such as trust, openness, honesty, cooperation, tolerance, and respect.

However, Guetzkow (2002) identifies the difficulties in measuring the impact of the arts on communities. For instance, the definition of “arts” cannot be limited to that definition, which is provided above. Guetzkow (2002) questions the definition of “the arts,” “impact,” and “communities”:

When speaking of “the arts,” do we refer to individual participation (an audience member or direct involvement?), to the presence of arts organizations (non-profit *and* for-profit?) or to art/cultural districts, festivals or community arts?

When speaking of “impact,” do we refer to economic, cultural or social impact; do we refer to exclusivity to direct community-level effects or do we also include individual-and organizational-level ones? By “communities,” do we mean regions, cities, neighborhoods, schools or ethnic groups?

Guetzkow (2002) highlights the fact that there is no authoritative answer to the above questions; there exists no specific consensus amongst the literature on fundamental definitions, which can prove difficult in forming one mass body of literature on the effect of art on macro social work issues such as community development, ascertaining of social capital, and promoting civic engagement.

***Promote interaction in public space***



Public art spaces, from museums to art organizations, are civic spaces and provide an alternative source of education to participants (Saguaro Seminar on Civic Engagement in America, 2000; Moxley et al., 2012)}. Borrup (2007) first discusses the importance of public, communal space for social interaction, as these spaces allow for almost daily exposure to a variety of individuals and neighbors. Borrup (2007) purports that crowded, pedestrian-friendly, active spaces tend to be safe, economically productive, and conducive to healthy civic communities. The arts and art spaces can act as valuable resources in fostering social capital by strengthening friendships, helping communities to understand and celebrate their cultures and in providing a safe place to discuss and solve social problems. While the design of the public space is important for setting the tone of how it will be used, it is, in fact, the management of the space (i.e. how space is maintained and activities programmed), which accounts for 80 percent of the success of the space. Based on this concept, public art administrators and cultural planners can work with muralists, architects, landscape architects, and other individuals across disciplines such as engineering to create spaces, which promote public interaction and promote the safety and economic productivity characteristic of healthy civic communities (Borrup, 2007).

### ***Increase in and broadening of civic participation***

A collective effect of art is the promotion of celebration. Art provides a means, outlet, and visual representation of community culture, heritage, and identity. Broadly, culture is a driver of development and art is one manifestation of culture (Saguaro Seminar on Civic Engagement in America, 2000; Borrup, 2007; UNESCO, 2012). The American Planning Association (n.d.) discusses the use of traditional tools such as public opinion surveys, town halls, and public hearings as a means of eliciting social engagement. However, the American Planning Association (n.d.) discusses the limitations of said traditional civic engagement tools as falling short of eliciting maximum civic participation. Instead, the American Planning Association (n.d.) identifies more creative civic engagement methods such as the use of visual arts as a means of recruiting more collective participation in the civic sector. The National Endowment for the Arts (2009) claims a direct correlation between the arts and civic engagement, leading to the following conclusions

First, American adults who visit art museums and galleries, or who attend live art performances are more likely than non-attendees to vote, volunteer, or participate in community events. For instance, according to a 2007 study, individuals the rate of individuals who volunteered at least once over a 12-month period was 35 percentage points higher for those who attended performing arts performances (57 percent) than those individuals who did not. Additionally, the volunteer rate of individuals who visited museums was more than double that of those who did not visit museums at 58 percent.

Second, those who participate in the arts sector have relatively high rates of volunteerism, which continue to prevail, despite multiple demographic factors including education, gender, age, and parental status. Third, arts participants show a greater likelihood of community involvement in other ways such as sports involvement, collaborative art-making, and taking children to out-of-school performances (National Endowment for the Arts, 2009). In sum, the literature shows a direct correlation between rates of volunteerism and other forms of civic engagement (i.e., voting), and participation in the arts.

The Seguro Seminar on Civic Engagement in America (2000) asserts that art, not only attracts civic engagement and investment but is also instrumental in broadening this through the acquisition of social capital, “Whether we are spectators, performers, or producers, the arts provide a uniquely enjoyable way to build our stock of informal social capital...Beyond the individual effects, the arts allow for public celebration and exploration of the meaning of community” (p. 1). In other words, participation in the arts, regardless of how one participates (i.e., as artist, consumer, visitor, spectator), facilitates the development of informal and collective social capital as the celebration of public art ignites a sense of civic pride - the collective can be proud of what it has collectively produced (Seguro Seminar on Civic Engagement in America, 2000). Additionally, art allows for the exploration and examination of community identity and meaning, and a means of providing a creative outlet for those communities, which are often marginalized. Art provides a safe way of bridging gaps between diverse members of the same community – those with different histories, ethnicities, and races – or members of diverse communities (Seguro Seminar on Civic Engagement in America, 2000).

Finally, art can serve as encouragement to engage in a civil dialogue concerning those issues most difficult to discuss. For example, the Vietnam Memorial, located on the mall in Washington, DC and created by Maya Lin captured and helped spur a national conversation about the complex emotions, thoughts, and memories of the controversial Vietnam War (Seguro Seminar on Civic Engagement in America, 2000).

### ***Youth engagement***

Borup (2007) stresses the importance of youth engagement in community development. Youth engagement in the arts is listed as a high priority amongst many art organizations; 100 percent of members belonging to the National Guild for Community Arts Education ranked training and information on effective music and arts programs for adolescents as one of their top priorities (Hirzy, 2011). Beyond improving art skills, high-quality arts education also improves life skills, self-image, and social commitment (for more detailed information, please see “Methods: Micro and macro”) (Hirzy, 2011).

### ***Promote power and preservation of place***

As mentioned previously, art is a powerful tool in increasing stakeholder involvement, as well as investment in communities. Borup (2007) asserts that community involvement in the design,

creation, and upkeep of spaces is instrumental in developing an interest in their utilization and maintenance, as it promotes common ownership. Denzin (2013) reminds us that social work as a profession is concerned with educating people on the issues facing their communities and that the arts aid in facilitating this education, “That the arts can offer vehicles for gaining insight into social issues, and how people experience them, make both the arts and humanities especially important to social work given the profession’s commitment to taking action through partnership with people who experience first-hand the causes and consequences of social issues” (Moxley et al., 2012; p. 704). Gross (2014) discusses the instance when St. Christopher’s Hospital for Children in Philadelphia moved locations and struggled with how to make the new environment appealing to children and engaging for families. St. Christopher’s enlisted the help of a local non-profit organization, which develops community-made public art projects designed to spur social change. Pediatric patients worked with local community children to create different art pieces for the hospital and in doing so, were able to take ownership of the new space and St. Christopher’s re-engaged with the community like this (Gross, 2014).

### ***Art related Health and Wellness***

Similar to the way in which Gray and Webb (2008) describe social work as an art in and of itself, so too, is the medical field (Battista, Hodge, & Vineis, 1995). Battista et al. (1995) discuss medical practice as being comprised of both science and art; although the medical profession is constantly expanding on the scientific knowledge and evidence, at its core, healthcare is grounded in the interpersonal relationship between patient and caregiver. Battista et al. (1995) make the case that the art of healthcare is largely found within the interpersonal relationship and interactions between patient and doctor:

Debate over whether the clinical practice is “*artful science*” or “*scientific art*” springs in part from the shared realization that, while scientific instruments are used in the practice of medicine, these instruments do not fully define the complexity of medical practice. The integration of scientific data with the values, beliefs, and preferences of patients is at the heart of the practice of medicine, and practice must be both science and art if it is to be effective and meaningful for both patient and practitioner (p. 877).

In sum, medicine is viewed as the intersection of art and science largely due to the interpersonal and clinical nature of patient-practitioner relationships.

However, the creative and visual arts also have a place in medical education, practice, and knowledge acquisition. Glatter (2013) reports that a trend among medical school’s admissions committees is to look for a creative and visual arts background in applicants as skills in these areas may enhance the ability of students to excel, not just in medical school, but also as physicians in professional settings. “It seems that students with more ‘right brain’ qualities – related to imagery, visual and drawing skills – have begun to emerge as more successful in today’s digital, image-based world of medicine” (p. 1). Dr. Mangione, Associate Professor of Medicine at Thomas Jefferson University, points to the observation that many artists, such as

Leonardo Da Vinci, are the ones who originally created diagrams of human anatomy, medical findings, and the human body. The Alpert Medical School at Brown University hosts a creative medicine series, which focuses on connecting the visual and creative arts with medical and clinical practices (Brown, n.d.).

Finally, much like in a social work clinical setting, art is used in the medical field with patients and their caregivers as a way of facilitating creative expression, working through the psychological trauma that accompanies physical injury, as a means of promoting healing, well-being, and self-esteem. Camic (2008) calls to attention the valuable place that art holds in the healthcare field:

The arts and health field takes a broad-based perspective in examining the uses of the arts in health care. It includes the work of arts therapists in clinical practice but also involves developing governmental policy, organizing community health interventions, enhancing health promotion strategies, improving the aesthetic environment of health care settings and undertaking research that examines a range of biopsychosocial factors that are impacted by arts participation (p. 288).

Camic (2008) goes on to list a range of projects in which art has been integrated into the healthcare field: artists who have participated in the design of facilities; arts programming in hospitals, music as a means of improving social cohesion, self-esteem, and cognitive functioning in older adult populations; investigating the relationship between healthcare facility aesthetics and health outcomes in patients; decreasing social isolation; in issues related to women's health, HIV/AIDS issues and hospitalized youth, and many others (Baron, 1995; Breslow, 1997; Eades, 1997; Graham-Pole & Rockwood Lane, 1997; Hays & Minichiello, 2005; Kirklin & Richardson, 2001; Isaacs, 1994; Lawson & Phiri, 2005; Mitchell, DeLange, Moletsane, Stuart, & Buthelezi, 2005; Radley & Taylor, 2003; Staricoff, 2004; Starticoff & Duncan, 2003; Staricoff, Duncan, Wright, Loppert, & Scott, 2001; Staricoff & Loppert, 2003; Wang, Morrel-Samules, Hutchison, Bell, & Pestronk, 2004; Wang, 1999.)Puig, Min Lee, Goodwin, and Sherrard (2006) integrated creative arts therapies with patients newly diagnosed with Stage I and Stage II breast cancer. The aim of the study was to use creative arts therapies to enhance emotional expression, spirituality, and psychological well-being and they found that while creative arts interventions was not effective in enhancing the emotional approach coping style of emotional expression of their levels of spirituality, creative arts therapies did enhance psychological well-being for patients through decreasing negative emotional states and augmenting positive ones (Puig at al., 2006). Johnson (1987) discussed the importance of creative arts therapies in the diagnosis and treatment of psychological trauma, as often patients have difficulty expressing themselves verbally following a traumatic incident and the creative arts provide an alternative means of self-expression. Walsh, Culpepper Martin, and Schmidt (2004) tested the efficacy of creative arts therapy interventions on caregivers whose family members were diagnosed with cancer. Walsh et al. (2004) discovered that creative art interventions did, in fact, have a positive short-term effect in reducing caregiver anxiety and stress, and increasing positive emotions.

***Special education***

In the field of special education, the arts provide an alternative means of teaching and learning, as well as an alternative means of facilitating growth and development (Lyons & Tropea, 1987). Andrus (2012) describes the role of art in special education as being instrumental in prevention, as it promotes self-esteem and social collaboration, decreasing feelings of isolation in students at high-risk for dropout in high schools; developing identities, art helps children in their development and search for an identity that includes a sense of competence and empowerment; and as a vital source of knowledge. Often students with special needs are put in classrooms with teachers that must connect in different ways leading teachers to use different types of activities. Evidence supports, “music promotes motivational, social and emotional development” (Bunt & Stige, 2014). Students that can express themselves, are given the opportunity to be motivated, and have social connections, are going to be those whom grow and thrive in the school environment.

Andrus (2012) outlines strategies for teaching students with special needs (particularly those from urban areas) and includes, not only knowing those whom you teach, but also helping students discover and develop a cultural identity through art experiences, incorporating an interdisciplinary approach to art in the classroom, and including more sensory experiences through art. Wexler (2012) discusses art as a means of self-representation for individuals with developmental disabilities. Seham (2012), and Adamek and Darrow (2012) include art like dance and music as a means of facilitating self-determination and transition into community life and environments.

## **Conclusion**

The active integration of art in the social service professions, ranging from social work to occupational therapy, has been demonstrated as useful for achieving micro and macro aims. Tools such as The Mosaic Model help us to incorporate art and its abstract and many times subjective derivatives into more concrete configurations such as those involved in social work research and practice. A younger generation would likely benefit from catharses involving more bold forms of expression such as poetry, singing, and hip-hop. Research done by organizations such as The National Endowment of the Arts assists in proving evidence of community growth due to the usage of the arts. However, the body of research suggests that there is a shortage of theory in how and when to best integrate art interventions, and which specific interventions to use. To simply suggest that clients and patients of social workers be given a platform specifically for artist expression is just as broad as it is obvious. It can also be implied that the improper usage of these supposed techniques, in their occasionally biased and obscure nature, could potentially miscarry and cause added frustrations and feeling of incompetence for clients and patients. We must move towards a more theoretical understanding of art's place in direct, interpersonal interactions across disciplines, as well as in community building. It is essential that universities and organizations increase efforts to research possible artistic techniques as a means to provide safe, ethical, effective, and cost-efficient methods that integrate the natural necessity that is artistic expression into the improvement of lives.

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## A 199 YEARS OLD STORY: ON READING THE IMAGERY OF FRANKENSTEIN

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**Abstract:** The novel *“Frankenstein or The Modern Prometheus”* written by Mary Shelley in 1818, has kept its popularity over the two centuries since it was published to be the source of inspiration to a deluge of literature, movies, cartoons, plays and TV series. Shelley’s iconic work is considered to be one of the masterpieces of the gothic literature. The 1818 novel, first published in Britain in French, was set in 18th century and starts and ends with Captain Walton’s letters from 1700’s, to his sister Margaret Saville. At the time of its publishing, *“Frankenstein or The Modern Prometheus”* was met with great enthusiasm due to both its subject, and to the fact that the author was a woman. It tells the story of the medical student Victor Frankenstein, and his struggle to create a superior human being with the intents of ending illness, and an aim of achieving immortality. Victor Frankenstein, collects deceased body parts from graves and harnesses the power of Calvinism, alchemy, and electricity to create a *“monster”*, a common misinterpretation being the *“monster”* in question itself is named Frankenstein. In fact, the creature is not named, and is referred to simply as *“monster”* throughout the novel. In the first part of this study, Mary Shelley’s novel and the derivative works in the form of illustrations and caricatures are introduced. The second part, discusses the cinematic works and TV series, beginning from the first *“Frankenstein”* movie adaptation of J. Searle Dawley that uses, or draws inspiration from Shelley’s story. This study hinges around the ever popular *“monster”*, and its different transformations and interpretations over different time periods. The different scenes and posters from all mentioned movies are used as examples to the iconic objects, and to their manifestations used in the visualization of *“the monster”*.

**Keywords:** Frankenstein, Mary Reilly, Cinema, Illustration

### INTRODUCTION

*“Frankenstein or The Modern Prometheus”* written by Mary Shelley is one of the masterpieces of gothic literature. The novel which was published in French in 1818 in Great Britain takes place in the 18th century and it starts and ends with the letters Captain Walton wrote to his sister Margaret Saville in 17.. . Mother of British writer and poet Mary Shelley who was born on August 30, 1797 in London is one of the first known feminists and died at Shelley’s birth. Her father was William Godwin who was a politician and also a writer. The author married to the poet Percy Shelley in 1816. The first poem of Shelley was published when she was 10 years old and her work *“Frankenstein or the Modern Prometheus”* leading her to great success was published when she was 21 (Shelley, 2008: 1). The novel *“Frankenstein or the Modern Prometheus”*, which attracted great attention in terms of its plot and gender of its writer, is about the struggle of Victor Frankenstein, who is a medical student, for creating a superior human in an attempt to end diseases and achieve immortality. By combining various corpse parts he collected from graves, Victor Frankenstein creates a *monster* with the help of calvinism, alchemy and electricity. Name of the monster being Frankenstein is a common misconception. During the novel, it is realized that the monster actually does not have a name and is called *“Monster”*.

### Frankenstein’s Monster in Illustrations

It is known that since its first edition in 1818, the book has been visually accompanied by different illustrations and pictures in different editions. As a result of Frankenstein's monster having been iconized throughout the years, different artists performed different visualizations for the portrayal of this monster. The illustration of Doctor Frankenstein and the monster which was on the cover of the first edition of the book in 1818 was drawn by Theodor Von Holst and is the first sample of this visualization.



**Figure 1:** “*Frankenstein or the Modern Prometheus*” (1818) illustration drawn by Theodor Von Holst<sup>1</sup>

According to Browne, the illustration in the book was drawn as a result of getting inspired by the lines below (2010:52):

“...It was on a dreary night of November that I beheld the accomplishment of my toils. With an anxiety that almost amounted to agony, I collected the instruments of life around me, that I might infuse a spark of being into the lifeless thing that lay at my feet. It was already one in the morning; the rain pattered dismally against the panes, and my candle was nearly burnt out, when, by the glimmer of the half-extinguished light, I saw the dull yellow eye of the creature open; it breathed hard, and a convulsive motion agitated its limbs...(Shelley, 2014: 58) .

In the illustration, it is seen that the “monster” looks like a human being; holds its long wavy black hair with its hand; and that its body is rather muscled. Right beside the naked “monster”, who is sitting on a shattered skeleton, stands an open book. In 1823, Shelley’s book was adapted into theatre by Richard Brinsley Peake under the name “*Presumption! or, The Fate of Frankenstein*”, being the first theatre adaptation of the novel. In the poster of the play, which was adapted only five years after the book had been published<sup>2</sup>, we see actor Thomas Potter Cooke portrayed as the “monster”. As seen in the poster, the monster has curly black hair and looks a lot like a human-being with loose clothes covering half of his body while he is holding a sword in his hand (Figure 2). We see Doctor Frankenstein, on the other hand, sitting on the floor dreadfully and is rather small compared to the monster.

<sup>1</sup> <http://exhibitions.nypl.org/biblion/outsidere/image/0-nypl-096>

<sup>2</sup> <http://exhibitions.nypl.org/biblion/outsidere/frankenstein/gallery/galleryfrankensteinintheater>



**Figure 2:** Poster of the play “*Presumption! or, The Fate of Frankenstein*”<sup>3</sup> (1823)

Another illustration of Frankenstein and the monster was published on the September 8, 1866 issue of a political humor magazine in London called *Punch, or the London Charivari* (Figure 3). In the caricature, which was drawn by John Tenniel and could be categorized as the 19<sup>th</sup> century political caricatures, there are 3 different elements attracting notice. First of all, as a symbol of brainless violence, the giant which was portrayed as Frankenstein’s monster symbolizes a worker engaged in earthwork and digging (Morris, 2005: 283). Representing the reconstruction periods in the USA and rebellion of people for labor rights in the UK, this monster was drawn in an excessive size and wears boiler suit and holds a cigarette in his mouth with an aggressive impression on his face<sup>4</sup>. The second factor is that John Bright, who was a British politician exercising in the field of laborers’ right for enfranchisement, was portrayed as walking on his tiptoes under the shadow of the monster with a frightened impression. The last detail exists at the very bottom of the page in the form of a two-piece writing. The title of the caricature *The Brummagem Frankenstein* is written in capitals and centered. The word *Brummagem* in the title corresponds to the workers, who work in Birmingham, pronouncing *Birmingham*<sup>5</sup>. The first piece includes a quotation from the speech delivered by John Bright in Birmingham:

“*I have no fe-fe-fear of ma-manhood suffrage!*”. The second piece includes: “*The unwillingness of Parliament to accept any measure of Reform had aroused a wide-spread discontent amongst the working classes. A monster gathering was held at Birmingham in August-1886.*”

Referring to the contradictory labor-bourgeoisie classification of the time, these texts are reflected via the illustration of Frankenstein’s monster who symbolizes the rage of working class.



<sup>3</sup> <http://exhibitions.nypl.org/biblion/outside/image/0-nypl-089>

<sup>4</sup> <http://www.st-andrews.ac.uk/~cjmm/Franklec.html>

<sup>5</sup> <http://exhibitions.nypl.org/biblion/outside/frankenstein/image/0-nypl-232>

**Figure 3:** “*The Brummagem Frankenstein*” (1866) caricature drawn by John Tenniel<sup>6</sup>

Another illustration of Frankenstein and the monster was published in May 20, 1882 edition of the same magazine (Figure 3). The caricature called *The Irish Frankenstein* was also drawn by John Tenniel. This caricature falls under the category of the 19<sup>th</sup> century political caricatures and was drawn upon the murder of two British diplomats at Phoenix Park by nationalists, which went down to history as *Phoenix Park Murders*<sup>7</sup>. The text under the caricature is as follows: “*The baneful and blood-stained monster... Yet was it not my Master to the very extent that it was my Creature?... Had I not breathed into my own spirit?*”

The politician standing at the back in the caricature is known to be Charles Stewart Parnell<sup>8</sup>. Parnell, who was an Irish politician, presided the process of forming a real *Home Rule* in British Parliament. The caricature mainly describes Irish community creating a monster through self-determination. As seen, Frankenstein’s monster is almost twice the size of the politician and holds a knife with blood on it. Wearing a torn cloak, the monster also wears a mask on his eyes. When looked closely, it can be suggested that the monster did not fully complete its evolution and looks like a *homo rudolfensis*<sup>9</sup> or *homo erectus*<sup>10</sup>.

**Figure 4:** “*The Irish Frankenstein*” (1882) caricature drawn by John Tenniel<sup>11</sup>

In 1900s, it is possible to see illustrations by different artists in different editions of the novel *Frankenstein or the Modern Prometheus*. The first artist was Lynd Ward, who illustrated the book for the version published by *Harrison Smith and Robert Haas* in New York. The main reason why Lynd Ward’s illustrations became so famous was the feelings he gave to the readers. Readers were able to feel fear and mercy for the monster at the same time. With Lynd’s illustrations, story of the book turned into serial drawings for the first time. The illustration on page 55 of the original copy of *Frankenstein* (1934) in English, is the illustrated version of the below stated part of Shelley’s story (Figure 5):

“He held up the curtain of the bed; and his eyes, if eyes they may be called, were fixed on me. His jaws opened, and he muttered some inarticulate sounds, while a grin wrinkled

<sup>6</sup> <http://exhibitions.nypl.org/biblion/sites/exhibitions.nypl.org/biblion/files/imagecache/standalone-image/1124592u.jpg>

<sup>7</sup> <http://global.britannica.com/event/Phoenix-Park-murders>

<sup>8</sup> <http://global.britannica.com/biography/Charles-Stewart-Parnell>

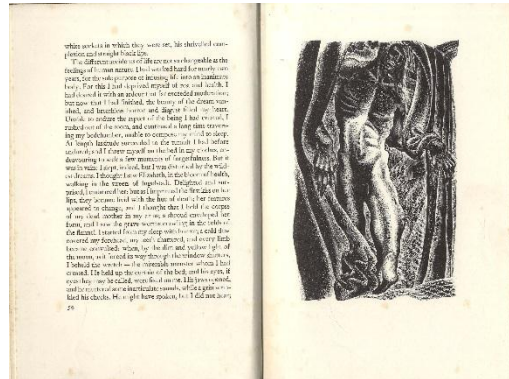
<sup>9</sup> An extinct species of hominid. It has been categorized as a different species upon excavating a KNM-ER 1470 coded skull fossil.

<sup>10</sup> An extinct species of human. Existed nearly 1.9 million years ago. Categorized between “Australopithecus” which is closer to apes and modern human-beings “Homo Sapiens”.

<sup>11</sup> [https://upload.wikimedia.org/wikipedia/commons/0/03/The\\_Irish\\_Frankenstein\\_-\\_Punch\\_%2820\\_May\\_1882%29%2C\\_page\\_235\\_-\\_BL.jpg](https://upload.wikimedia.org/wikipedia/commons/0/03/The_Irish_Frankenstein_-_Punch_%2820_May_1882%29%2C_page_235_-_BL.jpg)



his cheeks. He might have spoken, but I did not hear; one hand was stretched out, seemingly to detain me, but I escaped and rushed downstairs... (Shelley, 2014: 59)”



**Figure 5:** “Monster” illustration drawn by Lynd Ward for the novel “*Frankenstein*” (1934)<sup>12</sup>

In the following years, story of Frankenstein became subject to many comic books with different illustrations. The 26<sup>th</sup> edition of the comic book series *Classics Illustrated*<sup>13</sup> tells the story of Frankenstein. However, different dates are specified in different sources for the publishing year of this edition; and therefore, it is found that there are various versions for the cover of the 26<sup>th</sup> edition.

**Frankenstein’s Monster in Movies**

After Shelley’s novel *Frankenstein or the Modern Prometheus* had been adapted into theatre plays, in time, it was realized that the power of characters and course of events in the story was also applicable to cinema, as a result of which several movies and TV serials handled the story of Frankenstein. Some of the movies were quite faithful to Shelley’s novel and formed a coherent plotline; while some of them recreated the plot and used the character of monster only.

“Postmodern horror movies which brought together kinds and clichés in multiple stories in one movie, also combined two genders in one body, and even more, many characters based on one horror character within the same story (Demirci, 2006: 36-37).”

The common ground of the movies of Frankenstein’s monster produced in 1910-2018 is that; it was sometimes projected only as the monster and sometimes along with other horror elements. While some of the movies contained science-fiction elements, most of them included horror indicators. Despite the limited number, it is also possible to encounter with movies of horror-comedy genre where caricatured characters are used. It is safe to suggest that most of the movies’ major axis is the thesis that; combination of multiple organs in one body with the help of a powerful electrical energy is the direct result of the alienation of selfhood to its own body starting with self-motive (Demirci, 2006: 35), and that it is used as a tool to define the baseline of monster’s reason of being.

**Table 1:** Movies of Frankenstein’s monster produced in 1910-2018

	Title	Year	Type	Producer	Monster played by	Country
1.	Frankenstein	1910	Motion Picture	J. Searle Dawley	Charles Ogle	USA

<sup>12</sup> <http://www.fulltable.com/vts/aoi/w/ward/frankenstein/SH608.jpg>

<sup>13</sup> Comic book series where the stories of famous literature Works are told. A total of 169 editions were published between 1941-1971.



2.	Life Without Soul	1915	Motion Picture	Joseph W. Smiley	Percy Standing	USA
3.	Il Mostro di Frankenstein	1921	Motion Picture	Eugenio Testa	Umberto Guarracino	Italy
4.	Frankenstein	1931	Motion Picture	James Whale	Boris Karloff	USA
5.	Bride of Frankenstein	1935	Motion Picture	James Whale	Boris Karloff	USA
6.	El Superloco	1937	Motion Picture	Juan José Segura	-	Mexico
7.	Son of Frankenstein	1939	Motion Picture	Rowland V. Lee	Boris Karloff	USA
8.	The Ghost of Frankenstein	1942	Motion Picture	Eric C. Kenton	Lon Chaney Jr.	USA
9.	Frankenstein Meets the Wolf Man	1943	Motion Picture	Row William Neil	Lon Chaney Jr.	USA
10.	House of Frankenstein	1944	Motion Picture	Erle C. Kenton	Glenn Strange	USA
11.	House of Dracula	1945	Motion Picture	Erle C. Keaton	Glenn Strange	USA
12.	Abbott and Costello Meet Frankenstein	1948	Motion Picture	Charles Barton	Glenn Strange	USA
13.	The Curse of Frankenstein	1957	Motion Picture	Terence Fisher	Christopher Lee	Britain
14.	I Was a Teenage Frankenstein	1957	Motion Picture	Herbert L. Stock	Gary Conway	USA
15.	How to Make a Monster	1958	Motion Picture	Herbert L. Stock	-	USA
16.	The Revenge of Frankenstein	1958	Motion Picture	Terence Fisher	Micheal Gwynn	Britain
17.	Frankenstein's Daughter	1958	Motion Picture	Richard E. Cunha	Harry Wilson	USA
18.	Tales of Frankenstein	1958	TV Movie	Curt Siodmak	Don Megowan	Britain
19.	Frankenstein 1970	1958	Motion Picture	Howard W. Koch	Boris Karloff	USA
20.	Orlaki el Infierno de Frankenstein, The Hell of Frankenstein	1960	Motion Picture	Rafael Baledon	-	Mexico
21.	Frankenstein, the Vampire and Company	1962	Motion Picture	Benito Alazraki	-	Mexico
22.	The Evil of Frankenstein	1964	Motion Picture	Freddie Francis	Peter Wodthorpe	Britain
23.	The Munsters	1964 - 1966	TV Serial	Ed Haas, Norm	Fred Gwynne	USA

				Liebmann		
24	Frankenstein Conquers the World	1965	Motion Picture	Ishiro Honda	Koji Furuhata	Japan
25	Frankenstein Meets the Spacemonster	1965	Motion Picture	Robert Gaffney	-	USA
26	Jesse James Meets Frankenstein's Daughter	1966	Motion Picture	William Beaudine	-	USA
27	Munster, Go Home!	1966	Motion Picture	Earl Bellamy	Fred Gwynne	USA
28	Frankenstein Created Woman	1967	Motion Picture	Terence Fisher	Susan Denberg	Britain
29	Frankenstein's Bloody Terror	1968	Motion Picture	Enrique Lopez Eguiluz	-	USA
30	Killink Frankeştayn ve Dr. No'ya Karşı	1968	Motion Picture	Nuri Akıncı	-	Turkey
31	Frankenstein Must Be Destroyed	1969	Motion Picture	Terence Fisher	George Pravda	Britain
32	Horror of Frankenstein	1970	Motion Picture	Jimmy Singster	David Prowse	Britain
33	Dr. Frankenstein on Campus	1970	Motion Picture	Gilbert W. Taylor	-	Canada
34	Lady Frankenstein	1971	Motion Picture	Mel Welles Aureliano Luppi	-	Italy
35	Dracula vs. Frankenstein	1971	Motion Picture	Al Adamson	John Bloom	USA
36	Frankenstein '80	1972	Motion Picture	Mario Mancini	Xiro Papas	Italy
37	Santo vs. la Hija de Frankenstein	1972	Motion Picture	Miguel M. Delgado	--	Mexico
38	Dracula contra Frankenstein	1972	Motion Picture	Jesus Franco	Fernando Bilbao	France
39	Frankenstein: The True Story	1973	TV Movie	Jack Smight	Micheal Sarrazin	USA
40	La Maldicion de Frankenstein, The Erotic Rites of Frankenstein	1973	Motion Picture	Jesus Franco	Fernando Bilbao	France
41	Blackenstein	1973	Motion Picture	William A. Levey	-	USA
42	Flesh for Frankenstein	1973	Motion Picture	Paul Morrissey Antonio Margheriti	Srdjan Zelenovic	USA

43	The Wide World of Mystery Frankenstein	1973	TV Movie	Glenn Jordan	Bo Svenson	USA
44	Terror! Il Castelo delle Donne Maladette Frankenstein's Castle of Freaks	1974	Motion Picture	Dick Randall	-	Italy
45	Santo y Blue Demon Contra el Doctor Frankenstein	1974	Motion Picture	Miguel M. Delgado	-	Mexico
46	Young Frankenstein	1974	Motion Picture	Mel Brooks	Peter Boyle	USA
47	Frankenstein and the Monster from Hell	1974	Motion Picture	Terence Fisher	David Prowse	Britain
48	Andy Warhol's Frankenstein	1974	Motion Picture	Paul Morrissey Andy Warhol	Dalila Di Lazzaro	USA
49	Sevimli Frankenştayn	1975	Motion Picture	Nejat Saydam	Savaş Başar	Turkey
50	Frankenstein all'Italiana	1975	Motion Picture	Armando Crispino	Aldo Maccione	Italy
51	Victor Frankenstein, Terror of Frankenstein	1977	Motion Picture	Calvin Floyd	Per Oscarsson	Sweden
52	Doctor Franken	1980	TV Movie	Marvin J. Chomsky Jeff Lieberman	Robert Perault	USA
53	Frankenstein Island	1981	Motion Picture	Jerry Warren	-	USA
54	The Munsters' Revenge	1981	TV Movie	Don Weis	Fred Gwynne	USA
55	Kyoufu Densetsu Kaiki! Frankenstein, Mystery! Frankenstein-Legend of Terror	1981	TV Movie	Yugo Serizawa	-	Japan
56	Frankenweenie	1984	Motion Picture	Tim Burton	-	USA
	Frankenstein's Great Aunt Tillie	1984	Motion Picture	Myron J. Gold	Miguel Angel Fuentes	Mexico
57	Frankenstein 90	1984	Motion Picture	Alain Jessua	Marc Lavoine	France
58	The Bride	1985	Motion	Franc	Jennifer Beals	France

.			Picture	Roddam		
59	The Munsters Today	1987-1991	TV Serial	Norman Abbott	John Schuck	USA
60	Frankenstein General Hospital	1988	Motion Picture	Deborah Romare	Irwin Keyes	USA
61	Frankenstein Unbound	1990	Motion Picture	Roger Corman	Nick Brimble	USA
62	Frankenhooker	1990	Motion Picture	Frank Henenlotter	-	USA
63	Frankenstein's Baby	1990	TV Serial	Robert Bierman	-	Britain
64	Frankenstein: The College Years	1991	TV Movie	Tom Shadyac	-	USA
65	Rasuto Furankenshutain, Last Frankenstein	1991	Motion Picture	Takeshi Kawamura	-	Japan
66	Frankenstein	1992	TV Movie	David Wickes	Randy Quaid	Britain
67	Mary Shelley's Frankenstein	1994	Motion Picture	Kenneth Branagh	Robert De Niro	Britain
68	Here Come the Munsters	1995	TV Movie	Robert Ginty	Edward Hermann	USA
69	The Munsters' Scary Little Christmas	1996	TV Movie	Ian Emes	Sam McMurray	USA
70	House of Frankenstein	1997	TV Serial	Peter Warner	Peter Crombie	USA
71	Frankenstein Reborn	1998	TV Movie	David DeCoteau	Ethan Wilde	USA
72	Toonsylvania	1998-2000	TV Dizisi	Bill Kopp Chris Otsuki	-	USA
73	Alvin and the Chipmunks Meet Frankenstein	1999	TV Movie	Kathi Castillo	-	USA
74	Frankenstein	2004	TV Serial	Kevin Connor	Luke Goss	USA
75	Frankenstein	2004	TV Serial	Marcus Nispel	-	USA
76	Van Helsing	2004	Motion Picture	Stephan Sommers	Shuler Hensley	USA
77	Frankenstein Reborn	2005	Motion Picture	Leigh Scott	-	USA
78	Frankenstein vs. the Creature from Blood Cove	2005	Motion Picture	William Winckler	Lawrance Furbish	USA
79	Frankenstein's	2006	Motion	John R. Hand	-	USA

.	Bloody Nightmare		Picture			
80	Monster Kids	2008	TV Movie	Scott Essman	-	USA
81	Frankenstein vs. the Wolfman	2008	Motion Picture	Colin Clarke	-	USA
82	Kyuketsu Shojō tai Shōjō Furanken, Vampire Girl vs. Frankenstein Girl	2009	TV Movie	Yoshihiro Nishimura Naoyuki Tomomatsu	Eri Otaguro	Japan
83	Frankenstein: Day of the Beast	2011	Motion Picture	Ricardo Islas	Tim Krueger	USA
84	Monster Brawl	2011	Motion Picture	Jesse Thomas Cook	-	Canada
85	Frankenweenie	2012	Motion Picture	Tim Burton	-	USA
86	Hotel Transylvania	2012	Motion Picture	Genndy Tartovsky	-	USA
87	Mockingbird Lane	2012	TV Serial	Bryan Singer	Jerry O'Connell	USA
88	Frankenstein's Army	2013	Motion Picture	Richard Raaphorst	-	Japan
89	Hotel Transylvania 2	2015	Motion Picture	Genndy Tartovsky	-	USA
90	The Frankenstein Theory	2013	Motion Picture	Andrew Weiner	Roger Morrissey	USA
91	I, Frankenstein	2014	Motion Picture	Stuart Beattie	Aaron Eckhart	USA
92	Frankenstein's Monster	2014	Motion Picture	Syd Lance	Matt Risoldi	USA
93	Scooby-Doo! Frankencreepy	2014	Motion Picture	Paul Mcevoy	-	USA
94	Penny Dreadful	2014 - 2016	TV Serial	John Logan	Rory Kinnear	USA
95	Victor Frankenstein	2015	Motion Picture	Paul McGuigan	Spencer Wilding	USA
96	The Frankenstein Chronicles	2015	TV Serial	Benjamin Ross Barry Langford	Sean Bean	Britain
97	Shisha no Teikoku	2015	TV Movie	Ryotaro Makihara	-	Japan
98	Frankenstein	2015	Motion Picture	Bernard Rose	Xavier Samuel	USA
99	Hotel Transylvania 3	2018	Motion Picture	Genndy Tartovsky	-	USA
10	Bride of	-	Motion	Bill Condon	Javier Bardem	USA

0.	Frankenstein		Picture			
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### Frankenstein (1910)

The first movie adaptation of Mary Shelley's novel *Frankenstein (1910)*, which was produced by Edison Studios, was directed by J. Searle Dawley. In the 12-minute movie which was shot in three days, Victor Frankenstein was played by Augustus Philips; the monster by Charles Ogle; and the fiancé of the doctor Elizabeth Lavenza Frankenstein by Mary Fuller<sup>14</sup>. On contrary to most of Frankenstein themed movies, in the movie *Frankenstein (1910)* instead of science, various potions and chemicals are used during the creation of the monster. In the first Frankenstein themed movie adapted into the cinema, it is possible to witness a monster which is quite different from the current visual disposition (Figure 6). With its humpback, giant body, big hands and feet, long wavy and messy hair, crooked mouth and big eyes, it can be proposed that the attempt was to make the character look like the one in the novel described by Shelley. In the novel, Shelley described the monster created by Doctor Frankenstein as:

“His limbs were in proportion, and I had selected his features as beautiful. Beautiful! Great God! His yellow skin scarcely covered the work of muscles and arteries beneath; his hair was of a lustrous black, and flowing; his teeth of a pearly whiteness; but these luxuriances only formed a more horrid contrast with his watery eyes, that seemed almost of the same colour as the dun-white sockets in which they were set, his shrivelled complexion and straight black lips. (2014: 58).”



Figure 6: Monster in “*Frankenstein*” (1910) movie<sup>15</sup>

### Life Without Soul (1915)

The second movie adaptation of Shelley's novel as a silent movie was the 70-minute movie *Life Without Soul* directed by Joseph W. Smiley in 1915. The movie was based on the story of a doctor giving a soul to a lifeless man and recreation of his body. The most prominent detail of the movie distinguishing it from all of the following Frankenstein movies is its finale where it turns out that the whole thing was actually Mary Shelley's dream. However, today there is no copy of the movie available and it is among the lost movies. All that remains from the movie is some photographs from the movie and its poster consisting of illustrations.

<sup>14</sup> <http://www.imdb.com/title/tt0001223/>

<sup>15</sup> <http://cinemassacre.com/wp-content/uploads/2009/10/1910.jpg>

### Frankenstein (1931)

It is James Whale who directed the first feature-length movie *Frankenstein*. The film was adapted from Shelley's novel in 1931 and categorized as one of the pioneers of Gothic Horror Cinema<sup>16</sup>. Rather than the novel, the movie was inspired by movies "*Der Golem (1915)*"<sup>17</sup>, "*The Magician (1926)*"<sup>18</sup> (Kemp, 2014: 92), "*Metropolis (1927)*"<sup>19</sup>, and "*Das Cabinet des Dr. Caligari (1920)*"<sup>20</sup> that were filtered from several theatre (and silent movies) versions in terms of visual components; such as camera angles, lighting, use of shadows and iconography (Akbulut, 2012: 17). Even though Whale included a deep and frightening sense of humor in the movie, he did not let it prevail the sense of fear (Odell ve Blanc, 2011: 106). James Whale, who is famous for its war themed movies and known to direct amateur theatres, directed four movies that could be included in horror genre. Being one of the foremost pioneers of American Horror Cinema, Whale started shooting the movie *Frankenstein* in 1931 upon contracting with Universal<sup>21</sup> company. Colin Clive was casted for the role of Doctor Henry Frankenstein and for the monster, Boris Karloff, who was not a very well-known actor at that time, was chosen (Akbulut, 2012: 17). Although Colin Clive delivered a convincingly obsessive and well-intentioned Dr. Frankenstein role, the main star of the movie was the monster Boris Karloff whose name was displayed as "?" in the list of leading actors (Odell ve Blanc, 2011: 106). According to the article "*The 10 Most Expensive Film Posters*" published by The Guardian in 2012, the poster of *Frankenstein* was ranked as the 10<sup>th</sup> in the list. The poster was sold for 198.000 dollars in 1993. Jack P. Pierce, who was the make-up artist, also had great contributions to the success of the movie. For *Frankenstein (1931)*, Pierce designed Karloff's classic image with angular face and massive nape. There are conspicuous details in the design process of the monster's face. First of all, it occurs that with a piece placed on Boris Karloff's head, the head was simulated much longer than usual with a completely flat top. Another detail is the clean-cut hair added later. The screws placed on the two sides of his neck, which indicated the conductivity as a result of its revival with the help of electricity in an attempt to give life to a lifeless body, became the symbol of the monster and was used almost in every movie. The make-up designed for Boris Karloff by Odell and Blanc (2011:122) Jack Pierce is referred to as *a groundbreaking make-up same as today's image of the monster*. That way, the first monster visually known today was introduced to the audience with the movie *Frankenstein (1931)*.

Size of this giant *monster* was described in Shelley's book as:

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<sup>16</sup> A genre where existing scary monsters or creatures from novels or mythological stories are adapted, containing classical horror stories.

<sup>17</sup> Movie, where the sculpture "Golem" revived by an antiquarian in light of a middle-age story and Jewish myth, falls in love with the antiquarian's wife. The movie is an example of expressionist German Cinema and was directed by Henrik Galeen and Paul Wegener.

<sup>18</sup> Movie directed by Rex Ingram, where the story of a magician and alchemist searching for virgin blood to be able to recreate life and pursue his studies is told.

<sup>19</sup> Another example of expressionist German Cinema directed by Fritz Lang. The movie takes place in a futuristic dystopia where the conflict of Marxist-capitalist system is told.

<sup>20</sup> Movie which is one of the pioneers of expressionist German Horror Cinema, directed by Robert Wiene. It is about serial murders taking place in a German town.

<sup>21</sup> After Universal Company had started producing gothic-oriented movies, horror became a recognized genre of cinema. With movies "*Dracula (1931)*" and "*Frankenstein (1931)*", the company fully formed the templates for themes, styles and inspirations of gothic horror. With similar gothic movies such as "*Murders in the Rue Morgue (1932)*", "*The Mummy (1932)*", "*Bride of Frankenstein (1935)*", the company proved itself in the industry and leaned on the reputation of "Universal Horror Movie" label (Kemp, 2014:89-90).

“As the minuteness of the parts formed a great hindrance to my speed, I resolved, contrary to my first intention, to make the being of a gigantic stature, that is to say, about eight feet in height, and proportionably large. (2014: 54).”

When we sub-read the text of *Frankenstein*, it is possible to observe the dichotomy involved in the book. One of them is on racial basis. Cherry describes this dichotomy as: “*The monster could be read as the representative of a racial difference. He is a giant and hulky savage in boilers suit, symbolizing the threat against virtuous woman* (2014: 175)”. The monster of *Frankenstein* wears an entirely black suit. This suit consists of a black t-shirt, a black jacket that falls short on his body, and black trousers with black bulky boots. Shortness of the sleeves causes the monster’s arms to look longer. Another detail in his image is his nails polished in black (Figure 7).



**Figure 7:** Monster in “*Frankenstein*” (1931) movie<sup>22</sup>

It is known that the production of *Frankenstein* (1931) movie was inspired by certain movies from Expressionist German cinema. Within this context, it is possible to observe these effects during the visualization process of the monster. The resemblance between the shoes of the monster in the movie *Frankenstein* (1931) and the character *Golem* in the movie *Der Golem* (1915) can be clearly observed in the comparison below (Figure 8).



**Figure 8:** Monster in “*Der Golem*” (1915) movie<sup>23</sup> and Monster in “*Frankenstein*” (1931) movie<sup>24</sup>

### The Curse of Frankenstein (1957)

<sup>22</sup> <https://christiangekdad.files.wordpress.com/2015/08/frankenstein-1931-crop-1.jpg>

<sup>23</sup> [https://horrorpediadotcom.files.wordpress.com/2015/02/le-golem-der-golem-wie-er-in-die-welt-kam-1920\\_portrait\\_w858.jpg](https://horrorpediadotcom.files.wordpress.com/2015/02/le-golem-der-golem-wie-er-in-die-welt-kam-1920_portrait_w858.jpg)

<sup>24</sup> <https://s-media-cache-ak0.pinimg.com/736x/42/60/a1/4260a16a21bdb1d62afd9924352a7f58.jpg>



In 1950s, another series of *Frankenstein* movies were also produced by the British Hammer company. The movie *The Curse of Frankenstein*, which was directed by Terence Fisher in 1957 and was generally based on Shelley's novel, was the first color *Frankenstein* movie. Due to copyright issues, the monster in *Frankenstein* movies produced by Hammer company was projected with a different image. As seen in the poster, the monster's illustration in red, which was illustrated by Christopher Lee, had almost nothing in common with the classic and iconized image of the monster.

#### **Frankenstein Created Woman (1967)**

The movie *Frankenstein Created Woman*, which was directed by Terence Fisher in 1967 and is the fourth *Frankenstein* themed movie of Hammer company, differs from its precedents in terms of its plot, in which metaphysical elements are involved and the relation between mind and body is told. In *Frankenstein Created Woman (1967)*, instead of recreating a monster, Doctor Frankenstein transplants the brain of a newly executed man into the body of a dead woman and revives her. Since Doctor Frankenstein does not recreate or perform an intervention in the physical characteristics of the monster, it is not possible to analyze and interpret the physical features of the monster in this movie.

#### **The Munsters (1964-1966) and Adaptations**

*The Munsters*, which was a sit-com representing the American family of 1960s, was broadcasted on American CBS channel between September 24 1964 and May 12 1966, in a total of 70 episodes<sup>25</sup>. Being a representative of the American family structure, the show attracted great attention back then, in terms of involving different horror characters from different periods as family members. The story where the father was the monster of Frankenstein; mother was the *Vampire*; the grandfather was the *Count Dracula*; and the little child of the family was the *Werewolf*, turned out to be a phenomenon whose different adaptations were directed over the years. In the show, we see the monster of Frankenstein as father of the family, under the name Herman Munster. However, the character was rather caricaturized in the show, instead of its classic monstrous image, due to being a comedy show. Although the character Herman Munster was very big in size, had a flat head with a scar on his face and screws on the sides of his neck, he looked like a cute creature rather than a horror icon. It is observed that this pretty image was preserved, or slightly changed, in all adaptations until 2012. The first adaptation of the story was shot as a TV movie in 1981 under the name *The Munsters' Revenge*, and the producers stayed faithful to all characters. Another adaptation was introduced to the audience in 1988 under the name *The Munsters Today*. This adaptation was shot as colored and continued to be broadcasted until 1991, in a total of 3 seasons. The final adaptation of the show was shot in 2012 called *Mockingbird Lane* being named after the address where *The Munsters* lived, and was broadcasted only as a pilot on October 26 2012 as a Halloween special episode. Due to not attracting the expected attention, NBC decided not to broadcast it further. The most prominent detail of the show was that unlike the other *The Munsters* adaptations, all the characters were reflected as human-beings.

#### **Frankenstein Conquers the World (1965)**

The kaiju<sup>26</sup> movie *Furankenshutain Tai Chitei Kaiju Baragon*, which was a Japanese-American co-production in 1965, was directed by Ishiro Honda. In the movie where it is possible to see the reflections of Japanese culture, Frankenstein's monster was actually named as *Frankenstein*, and was revived by Koji Furuhashi. One of the most remarkable differences in the movie was that the

<sup>25</sup> <http://www.munsters.com/about.php>

<sup>26</sup> Grotesque creatures meaning "giant monsters" in Japanese.

monster was sea-born. With the scenes where city-destroying and people-smashing giant *Baragon* and *Frankenstein* fight each other, it can be clearly seen that these two giants are 20 times bigger than other humans.

### **Frankenweenie (1984)**

The movie *Frankenweenie* (1984), where the character Victor revives his dog after feeling badly about its passing in an accident and finding out that electrical currents can move muscles, was directed by Tim Burton (Figure 9).



**Figure 9:** “*Frankenweenie*” (1984) movie poster<sup>27</sup>

In the movie *Frankenweenie* (1984), which is a funny reflection of Frankenstein’s iconized monster, it is observed that the classic design patterns of the monster was applied to Victor, as well. The screws on the sides of his neck and stitching marks on his head are the indicators of this application.

### **Mary Shelley’s Frankenstein (1994)**

When considered until the year of its broadcast, *Mary Shelley’s Frankenstein*, which was a gothic horror movie and a USA-England co-production in 1994, passed into the history as the most faithful movie adaptation of the time. In the movie directed by Kenneth Branagh, the monster of Frankenstein was played by Robert De Niro. In the movie, the monster was not caricatured; it looked rather like a human when compared to previous Frankenstein themed movies, and was designed in parallel with the gothic horror structure. Different from the previous examples, the deformation on his face was centered around his eyes and mouth with many stitching marks.

<sup>27</sup> [https://upload.wikimedia.org/wikipedia/en/f/f7/Frankenweenie\\_\(1984\\_film\)\\_poster.jpg](https://upload.wikimedia.org/wikipedia/en/f/f7/Frankenweenie_(1984_film)_poster.jpg)



**Figure 10:** Monster in “*Mary Shelley’s Frankenstein*” (1994) movie<sup>28</sup>

It is also observed that the outfit of the monster is also different in the movie. Instead of the classic black suit we used to see in previous movies, he wears a cloak-like clothing in order to walk around under cover. In *Mary Shelley’s Frankenstein* (1994), we see a monster who did not use to be ashamed of his physical appearance before, but is in an attempt to camouflage himself now.

**Hotel Transylvania (2012)**

The animated movie *Hotel Transylvania* (2012) produced by Sony Pictures was directed by Genndy Tartovksy. In the story where the iconized monsters of literature and cinema get together for the birthday of Count Dracula’s daughter, all the monsters are caricatured and designed by featuring their most prominent characteristics. It is seen in the movie that Frankenstein’s monster has a giant body. In addition to his droopy eyelids and big feet, there are also stitching marks on the wrists and head of the monster whose color was between green and gray (Figure 11).



**Figure 11:** Monster in “*Hotel Transylvania*” (2012) movie<sup>29</sup>

**Victor Frankenstein (2015)**

The final feature-length film among the adaptations of Shelley’s *Frankenstein or the Modern Prometheus* until today is “*Victor Frankenstein* (2015)” directed by Paul McGuigan in 2015. The production stayed faithful to the novel; however, one of the prominent details in the movie, which was not quite visible in the novel, was the story of Igor, who was Doctor Frankenstein’s assistant and used to be exhibited at circuses because of his formless body. The most important

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<sup>28</sup>

[http://cdn.sptndigital.com/sites/uk.smc/files/ct\\_movie\\_f\\_primary\\_image/mary\\_shelley\\_frankenstein\\_imgcropped\\_1600x900.jpg](http://cdn.sptndigital.com/sites/uk.smc/files/ct_movie_f_primary_image/mary_shelley_frankenstein_imgcropped_1600x900.jpg)

<sup>29</sup>

[http://vignette1.wikia.nocookie.net/hoteltransylvania/images/c/cb/Frank\\_full\\_body.jpg/revision/latest?cb=20120911025333](http://vignette1.wikia.nocookie.net/hoteltransylvania/images/c/cb/Frank_full_body.jpg/revision/latest?cb=20120911025333)

detail in the costume drama movie “*Victor Frankenstein (2015)*” is the image of the monsters created by Frankenstein. The creatures were projected as rather bloody and violent which is closer to the common perception of monster today. In furtherance of its general physical appearance, the monster was one of the most brutal ones every designed. It is possible to see deep stitching marks on the monster’s body whose skin was completely deformed; as well as its head covered in same scars (Figure 12).



**Figure 12:** Monster in “*Victor Frankenstein*” (2015) movie<sup>30</sup>

### **Penny Dreadful (2014 - 2016)**

The pilot episode of the TV series *Penny Dreadful*, which tells a story taking place in the 19<sup>th</sup> century Victorian London, was broadcasted in 2014. In the series where different gothic literary characters such as Dracula, Dorian Gray and Frankenstein’s monster co-exist, the monster was played by Rory Kinnear (Figure 13).



**Figure 13:** Poster of “*Penny Dreadful*” (2014-2016)<sup>31</sup>

With its pale skin, long black hair, the stitching mark on his face and charismatic posture, the monster is the final example of Frankenstein’s monsters inspired by Shelley’s novel and iconized over the years.

### **CONCLUSION**

It has been 199 years since Mary Shelley wrote the novel *Frankenstein or the Modern Prometheus* where *the frightening story of Doctor Frankenstein, who acts like God and attempts to give life to an artificial human by means of collecting corpse parts from graveyards and combining them* (Scognamillo, 1997: 30). Over the years, the monster created by Shelley has

<sup>30</sup> <http://1.bp.blogspot.com/-PIBGNs1Ok/VIUOWF4Qj0I/AAAAAAAAASlo/k1njEGNPR38/s1600/frankenstein.jpg>

<sup>31</sup> <http://www.flickeringmyth.com/wp-content/uploads/2014/05/Penny-Dreadful-S1-The-Creature.jpeg>

been subject to numerous works in different branches of art and interpreted in different ways in terms of its subtexts and adaptability to different fields. According to Demirci; Frankenstein movies handled meronymy variations and the fragmentation between organic-self or skin-desire on different narrative processes (2006: 35). The first chapter of this study focuses on the drawings and illustrations of Frankenstein's monster over the years, as well the analysis of several examples published in different fields; ranging from political caricatures to comic books. In the second chapter, movies and TV series where Frankenstein's monster was directly or indirectly involved are analyzed. Upon mentioning how the monster was illustrated in these movies or series, the scenes of the monster are selected and included in the study. Having analyzed the process starting from the silent movies in the early 1900s until the current state of cinema in 2010s with advanced computer and effect technology, this study concludes that *Frankenstein or the Modern Prometheus* can still be processed with the same excitement and depth, and that it is a literary work still attracting attention without losing its popularity.

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**BURNT BLANKETS BROKEN POTS: A METAPHORICAL REPRESENTATION OF  
SOCIETAL CHALLENGES IN NIGERIA VIA MIXED MEDIA  
CONCEPTUALISATION**

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**Abstract**

The current travails ravaging Nigeria as a country has attracted different opinions of concerns that sought to find a way out. Art societies and organisations in the country has also fashioned line of thoughts to enable artists in the country to be able to capture these travails in their different line of expressions using different media. The concern here is for artists to be able to contribute to contentious national issues of debate. One of such art organisation in Nigeria is African Artists' Foundation (AAF) with sponsorship from Nigerian Breweries (NB). This organisation organises annual National Art Competition with the aim of bringing artists together to use their creative prowess to interrogate national issues. The ninth edition -2016 of the competition saw our work titled "*Burnt Blankets, Broken Pots*" succeeding as one of the twelve finalists nationally. This is due to the conceptual indebt the collaborative mixed media art work possessed. This study aim to further utilise the inherent interrogative power of the art work in question to metaphorically interrogate some societal challenges in Nigeria in tactile form to attract relevant attention nationally and internationally.

Keywords: Burnt blankets broken pots, Metaphor, Interrogate, societal challenge

**Introduction**

This study is a direct result of the mixed media conceptual art work produced and presented at the 9<sup>th</sup> edition of National Art Competition (NAC) 2016, sponsored by Nigeria Breweries and organised by African Artist Foundation (AAF) in Lagos. The central theme of the art competition was "*Shifting Boundaries*", which according to NAC (2016) "is an exploration of the porous, situational, and ever changing concept of the boundary through artworks that will

discuss and embody what a boundary was, is, and will become in the 21st century”. Artists were asked to create works that reconcile, deconstruct, and develop the works around the theme Shifting Boundaries that address contemporary world especially as it relates to the nation, state, and society. In response to the call for submission of entry, “ *Burnt Blanket, Broken Pot* ” was conceived, generated and entered for the competition. Due to the conceptual indebted as relevant to the central theme of the competition and the interrogative strength conceded, the art work was shortlisted as one of the twelve finalist. Beyond the feat of being among the twelve finalists, it is worth an intellectual property for drawing relevant attention of both national and international audience to the issues raised. The work was produced through a collaboration from a ceramic artist and a textile artist.

There are divers approach to achieving an art work that is conceptual and interrogates social issues. There is no limitations to material usage and combination of different medium to achieving an art piece. The recent trend in the world of art just as it is in other disciplines today is collaboration between different fields of study to achieve an acceptable outcome. This study is a collaborative effort that delved into the realm of conceptuality for capturing and interrogating societal happenings as is peculiar to Nigeria. This installation art piece is a deliberate attempt by this study to contribute to national societal debate on ills befalling Nigeria society in a conceptual way. This is an explorative studio practice research that took its conceptual framework from the work of Gbaden (2014). To go further, there is need look at and understand some basic terms that are of importance to this study.

### **Blanket**

Blanket is a kind of bedding. It is, generally speaking, a large piece of woven cloth, intended to keep the user warm, traditionally while sleeping or lying down. A blanket traps the radiant heat from the user's body, and instead of dissipating into the air, it warms the user. It also protects against heat being lost by the processes of convection. The flexibility of dyed textile fabric as a utility media was used in this study to represent blanket and to strengthen the idea behind this work for colour appeal with the use of different colour dyes. This study has conceptualised blanket to be a source of solace to cover and shield against harsh economic impoverishment that has been mercilessly burnt by agents against progress in the Nigeria society. The second part of conceptualise destruction was represented by shreds of broken pots.

### **Broken Pots**

Usually, when a pot shatters, it demoralises and at times leads to discarding of such wares. Artists over time have devised means by which broken pots becomes creative means of design. Neje (2017) assert that broken pots are a new trend in gardening by creating all sorts of creative garden arrangements and fairy gardens out of broken pots, proving that even a broken pot can be useful and beautiful. Such pots can be created either from the shards left from an accidental break or from a carefully planned cut. The idea of this study was kick started from the point

when there was a ceramic firing casualty that resulted in shattering of good amount of ceramic wares in the kiln as a result of one form of technical fault or the other. Ordinarily, a disappointing scenario such as shattered ceramic wares from the kiln would have driven one into depression and discouragement. Instead it became inspirational and spurred the researchers into seeing *opportunity in casualty*. The traditional ceramic wares that were being fired for utilitarian purposes has now turned into an opportunity for conceptual thinking. The broken and shattered pots became a metaphor for insurgency (Boko haram, and Avengers) as occasioned by bomb blast of different magnitude.

### **Metaphorical Representation in Art**

At the intersection of aesthetics and epistemology lies the idea that works of art can convey knowledge of a kind/ and can enrich our understanding of the world. The many theories that have devolved from this central notion include those seeking to explain art in terms of a theory of metaphor: if art can be shown to be metaphorical/ art can therefore generate new meaning/ and so lay claim to epistemic legitimacy (Forsey,2001). Metaphor according to Punter (2007), “is Means of which one thing is made to stand in for another thing”. This word becomes very important as an operational term in this study because on its own, the conceptual work produced means nothing other than what can be identified at just mere looking at it. But the work becomes interrogative and conceptually meaningful when every aspect of the work has a story to tell for social relevance.

### **Conceptual Art**

From its inception, and continuing to this very day, conceptual art has been entangled in controversy by those who stake claims to its foundational moment. This phenomenon is highly paradoxical given that, as with avant-garde practice in general, the emergence of conceptual art was the result of complicated processes of selection, fusion, and rejection of antecedent forms and strategies (Alberro and Stimson, 1999). Conceptual art is a movement that prizes ideas over the formal or visual components of art works (LeWitt,2017). According to LeWitt, conceptual artists recognize that all art is essentially conceptual. In order to emphasize this, many conceptual artists reduced the material presence of the work to an absolute minimum - a tendency that some have referred to as the "dematerialization" of art. The idea of conceptuality in this study lies in the fact that the artwork produced from a first look, has identifiable fixtures in terms of colour usage, manipulation of materials and forms. On a second look, the art work has loads of ‘spiritual’ connotation which makes it conceptual. Spirituality here largely depended on the way materials were used in metaphorical manner to interrogate Nigeria societal challenges.

### **Nigeria Societal Challenges**



In a modern society like Nigeria, many contemporary social problems have emerged which are against the norms, morals and ethics of our society and of course make life very uncomfortable. Such problems include our deviance behaviour toward the commandments of God, for example, as in our struggle for the control of available scarce resources wrongly and violently. This in turn creates problems in the society especially among the have and the have not (George and Ukpog, 2013). According to Mike (2015), Nigeria has many problems. The biggest problem is corruption. This is at the root of many Nigeria's problems. Corruption takes many forms and infiltrates all political institutions and economic sectors. Due to the prevalence of corruption in Nigeria and its negative effect, Mike further revealed that judging by the American standard, about eighty five percent (85%) of Nigerians are poor. This gives birth to incidence of high involvement of her citizens in criminal activities such as corruption, bribery and all types of immoral conducts. Another biting societal challenge bedeviling the society is insurgency. Terrorist attacks are on the rise in Nigeria, which is the increased activities of Boko Haram over the past year. Bombings, kidnappings, and other violent activities of Boko Haram prevent many Nigerians from feeling safe. Nigerian artists have interrogated these challenges in one way or the other depending on the medium and specialisation of the artist, to contribute to national societal debate. One of such artist is Gbaden (2014). His works are centred around interrogating walls of partition through a new painterly technique that utilises fabrics in conjunction with oil paint.

### **Gbaden's Walls of Partition**

According to Gbaden (2014), society is inundated with tangible and intangible walls, barriers, boundaries, restrictions, fences, laws, stratifications and strictures which constrain the ability of human beings to fully express their rights as citizens of their country, and realise their full potentials and ultimate goals in life. Walls in the context of Gbaden's practice, denote a set of tripartite functions that can be viewed from the elemental, psychological and metaphorical perspectives. One of his walls is titled "religious worship" (see fig. 1 below). This wall captures the ephemeral plenitude of religious worship; we all worship a god who lives above us, perhaps too far away to hear our pleas for rectitude. The art work for this study though followed the path as set by the framework of Gbaden, is different in material combination, handling and in what it profess. While Gbaden combines fabric and oil paint, this study made use of fabric, dyes, twines and pottery shreds.



Fig. 1: “Wall of Religion” Fabric and oil Paint, Gbaden (2014)

### Materials and Processes

A studio based research approach was adopted in the development of the conceptual work. According to Byrd (2014), One advantage of art as a form of research is its ability to present material that is more evocative rather than denotative, unlike traditional research. This may lead to further questions, interpretations, and explorations creating a more complex picture of the information. Byrd further explained that, First as the Artist, one is involved in creating a work of art. Second, as the Researcher, one may explore various avenues of research. The subject matter as well as art creation may represent a form of research. This study adopts the studio based research approach for convenience in the actualisation of the aim of this research through a mix media approach.

Materials for generating the conceptual work are: White Chinos fabrics - three panels (see fig. 5), black linen fabrics, assorted vat dyes, paraffin wax, caustic soda, hydro sulphite, fibre twines, aluminium pipes, top bond and Broken terracotta shreds (see fig. 3). Chinos fabrics were de-sized to remove company starch from the materials. This is to allow for effective penetration of dyes during dying (see fig. 6). Hot water was used to mix the composition of chemicals and dyes for proper chemical reaction before application on the fabric at cold state. Depending on the effect that was achieved on each panel, tying and marbling were adopted at different intervals. Wax resist method was used to create the impression of agricultural pyramid on one of the fabrics (see fig. 7). Fibre twines were also dyed in different colours for variety. Tearing and burning of the dyed fabrics were carried out (see fig. 8) after which black linen were sewed to the back of each fabric panel as landing. The dyed fibre twines were penetrated at the top of the fabrics and knotted (see fig. 10) as metaphor for “hanging hopes”. Some percentage of the broken ceramics shreds were gathered and subjected to sawdust firing for black brown antique effect (see fig. 4) and also to achieve contrast on the fabrics. The shreds were fixed unto the dyed fabrics (see fig. 9) in a manner that suggests explosion and shattering of pots, pouring down to the foot of the fabrics. Finally, the three fabric panels carrying the exploded shredded pots were

installed (see fig. 11) in a way that allows the middle panel to be lowered than the two at the right and left sides, thus, the title.

A Preconceived idea of this study was presented first in drawing. The drawings express the first stage of the articulation of the thematic concept (see fig 2 below).



Fig. 2: Sketch of the work



Fig. 3: The Casualty pots



Fig. 4: Smoking of broken pots



Fig. 5: Plain Fabrics for exploration





Fig. 6: Dying of plain fabrics



Fig. 7: Impression of agricultural pyramid on fabric



Fig. 8: Burning effect on dyed fabric



Fig. 9: Sticking shreds of broken pots on dyed fabric





Fig. 10: Attaching rope appendages to the fabric



Fig. 11: Finished work

## Discussion

The art work consist of three fabric panels with different colour effect on them, these represents the Nigeria society. Hanging on the fabric panels are twines also of different colours. Notably on the fabrics are thorn effect achieved by burning. Shreds of shattered pots litters both on the fabrics and extending majorly to the floor. On the floor are also casualty ceramic figures standing and facing the panels. The first panel on the left represents agriculture. The one in the middle represents explosion while the one on the right hand side embodies a colourful and conducive environment for progress. Due to vested interest to control the resources of the nation, the different regions of the society has come to be bedevilled insurgency, Niger delta avengers and terrorism. This has resulted in maiming of lives, shattering of vital economical infrastructures and subjecting the country to sorry situation. Each time an explosion occurs, sympathizers that are directly or indirectly affected are in the habit of gathering to have first-hand experience of the scene. This is represented by the ceramic structures standing in front.

## Conclusion

“Burnt Blanket, Broken Pots” echoes the current travails of the society as a result of ill shifting of boundary accompanied by insatiability. Hopes are hanging and are been dashed and battered by inhuman man-made circumstances. “Blanket”, a source of solace to cover and shield against harsh economic impoverishment been mercilessly burnt by agents against progress. “Pots”, vessel for processing of the nation’s wealth suddenly turns into a playground for throwing “knockouts” not for fun but of destruction and bleeding the life out of the economy of the society.

The collaborative effort of a ceramic artist and a textile artist has shown a shift from the norm in both ceramics and textiles into an interrogative postmodern realm. The mixed media work is a social commentary of the angst befalling the society.

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**Do Countries Belonging to the same Continent Suggest the Same Investment, Growth, and Corruption Enhancing Variables? Evidence from Pakistan, India, & Russia**

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***Abstract***

*The lack of timely check and balance may be the biggest reason of corruption. Another feature behind the growing corruption level is the biased and non-integrated behavior of an individual. By recognizing the needs and wants of government individuals, a corruption level can be controlled. The chief motives of this study are; to investigate the impact of corruption on economic growth of a country and to investigate the impact of corruption on foreign direct investment (FDI) for a state over a period of 2001-2013. As literature suggested that economic growth can be boost-up by enhancing the level of FDI in a country, and both FDI as well as economic growth can achieve their sustainable levels through corruption free environment. The time span of 2006-2008 is very much interesting for all the selected countries in terms of their growth. The outcomes accomplishes that economic growth & FDI are strongly associated/linked with state's corruption.*

***Keywords:*** Corruption, Economic Growth, Foreign Direct Investment (FDI)

***Jel Classification:*** D73, F43, P45

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**INTRODUCTION**

In terms of global scenario, there is a continuing hot debate on the effects of corruption in terms of financial and economic perspective (Shao, Ivanov, Podobnik, & Stanley, 2007). As corruption is affecting the whole world in the current situation (Kutan, Douglas, & Judge, 2009), but the most dominant are Asian countries (Demetriades & Luintel, 1997; Sharafutdinova, 2010).

Are Pakistan, India, and Russia are growing nations? Is poverty can eliminate in the future? Is macroeconomic stability improves the economic growth? Is corruption a controllable dilemma? The most compelling factor is economic growth that is affecting the lives of Asian countries people (Agrawal, Sahoo, & Dash, 2009). Deliberate the level of poverty in the future is in general the estimation of economic constancy. A large number of factors involve in the growth of any country or its economic development. One of the major factors is the decrease in an industrial development/production and the other is an unfair money distribution. Zaman and

Khilji (2013) conclude that increase in an economic growth is possible by improving economic development and fair distribution/circulation of money among all groups of people.

How Pakistan, India, and Russia can grow their economy? How they will meet the most appropriate techniques for the control of corruption, as the sizes and structures of these 3 states vary from each other? As Asian nations are diverse in sizes and on account of such divergence these nations perform their operations in distinctive behavior; Pakistan has GDP of \$232.3 billion with a population of 191.8 million; its real growth rate of GDP is 4.1% and rate of inflation is 8.6%. India has GDP of \$2049.5 billion with a population of 1.299 billion; its real growth rate of GDP is 5.6% and rate of inflation is 6.0%, and India is contributing 2.65% of total world's GDP. And Russia has GDP of \$1860.6 billion with a population of 142.1million; its real growth rate of GDP is 0.5% and rate of inflation is 11.4%.

This study is to identify those factors which can be the cause for corruption. Another reason behind this study is to identify the most appropriate solutions in the form of recommendations toward the speedy corruption scenario around the globe.

When we go for measuring debasement in exact studies, we locate various conceivable signs. The most noteworthy profile measure is given by Transparency International, which utilizes review techniques to deliver the corruption perception index (CPI). Notwithstanding such observation based lists may not give emphatic reviews of debasement inside of nations; they do stay informative when utilized for cross-country examinations crosswise over nations.

### **Corruption Scenario in terms of Investment & Economic Growth**

Corruption, in general term, is a very much intricate sensation, where the government officials misuse their authorities for their particular achievements. It can be of numerous kinds, which involves; inducement, misappropriation, stealing, blackmailing, partiality, and manipulating contradictory benefits. In the global scenario, corruption is a communal aspect (Huang, 2015). Corruption is an old character that exists in the roots of Asian countries (Quah, 1999; Cheloukhine & King, 2007). Corruption sturdily distresses the economic wealth and progress (Krishnan, Teo, & Lim, 2013; Dimakou, 2008; Aladwani, 2016; Lau, Demir, & Bilgin, 2013; Paulus & Kristoufek, 2015; Collins, Uhlenbruck, & Rodriguez, 2009; Kutan, Douglas, & Judge, 2009). Fall in the level of corruption may raise the level of economic growth and stability (Pieroni & d'Agostino, 2013). Corruption may not directly affect the foreign direct investment (FDI); it may affect the economic growth, which may further affect the price stability in the country, which may again affect the exchange rate fluctuations and increase inflation in the country, which finally affects the foreign direct investment (FDI). FDI is one of the major components of economic growth for developing countries (Kuzmina, Volchkova, & Zueva, 2014). The corruption in the government organizations may significantly affect the trade among countries and foreign direct investment (FDI) (Doh, Rodriguez, Uhlenbruck, Collins, & Eden, 2003). Corruption may disturb the macro-economic environment of the country (Ulman, 2014). Most of the time, the insight regarding corruption may impact the state effectiveness (Ulman, 2014).

### ***Corruption situation in Pakistan***

Corruption in Pakistan comes in the greatest number of structures as there could be. It comes as gift accepting and giving. It exists in the show of force and impact through genuine and prepared associations with individuals in power and the additions they can get from others. The most noticeably bad type of debasement is scholarly and proficient deceptive nature to please or advantage a couple of individual at the expense of others. Just as risky is sycophancy which deceives individuals in decision making and has to great degree unsafe impacts.

Weak organizations of Pakistan are the major root cause of corruption (Farooq, Shahbaz, Arouri, & Teulon, 2013). Corruption is also the result of; democratic instability, conflict of interest in bureaucracy and judiciary, and out-of-date opponents in the military (Nasr, 1992; Syed, 1971; Sikka & Lehman, 2015; Roberts, 2015). In Pakistan, the corruption in civil services is considered to be a biggest evil on the way to economic growth (Maheshwari, 1974). Institutions must give attention on their internal employees in terms of accountability and transparency in order to control corruption (Timofeyev, 2015).

From 2006 and onward, the political situation of Pakistan is going to be stable (Khan, 2007).

### ***Corruption situation in India***

Corruption has logically included in each circle of Indian culture but Indian Parliament, businessman, policymakers, and civil societies are trying to make efficient anti-corruption strategies for such problems (Sondhi, 2000). Corruption is a growth that is not confined to a specific political gathering. Corruption may likewise unsympathetically disturb the state's strategy-building scenario in India (Niehaus & Sukhtankar, 2013). It contaminates the entire framework, as it is distressing the monetary growth vision in India (Sharma & Mitra, 2015).

There are numerous reasons for debasement in India. Various states of India, such as Rajasthan have raised a serious issue regarding corruption (Jenkins & Goetz, 1999). Nexus between Bureaucrats, Politician and culprits is the fundamental driver of debasement in each nation. The major reason of corruption is political and bureaucratic instability (Lambert-Mogiliansky, 2015; Gupta, 1995; Dwivedi & Jain, 1988; Paul, 1997; Bhattacharyya & Ghose, 1998). A legit government official has turned into an interesting expression. Absence of moral qualities and profound quality among directors and government officials, complete absence of open Corruption, lack of education among individuals, poor monetary base – all these are debasement to fix hold over the general population. One of the most important reasons for corruption in India is informal businesses – people are doing their businesses without any sort of registration and authentication (Dutta, Kar, & Roy, 2013). Complex laws and techniques to wipe out debasement demoralize the general population for stepping against Corruption. Debasement won everywhere scale amid decision times and votes are purchased with the assistance of pay off.

In India, with the passage of time, corruption is promoting day-by-day and affecting so many aspects of global growth (Shekhawat, 2005). The survival of corruption's element in the civil service of India is the prime threat to Indian democratic position (Muhar, 1965).

### ***Corruption situation in Russia***

Civil servants accountable for state tenders routinely request gigantic rewards from organizations offering for the agreements, which add to the expense of the bills that the state pays. As the low pays of civil servants is one of the major causes of corruption in Russia (Schulze, Suharnoko Sjahrir, & Zakharov, 2013). At the absolute starting point of the Tsardom of Muscovy, when the arrangement of open administration was built up, the bureaucratic mechanism presented no normal pay to its authorities, so that the potentate's workers needed to acknowledge different types of presents from the solicitants. Few of the common reasons behind the corruption in Russia are; urbanization, economic prosperity, & large metropolitan (Belousova, Goel, & Korhonen, 2011).

In Russia, weak quality of institutional structure is the main cause of corruption (Venard, 2009). Police violence is another major cause of corruption in Russia (Gerber & Mendelson, 2008). Corruption may also be the result of bribe taking and lack of "rule of law" in Russia (Boylan, Kpundeh, & Voltz, 1996, March). High level of corruption in Russia is adversely affecting the establishment of democracy (Dininio & Orttung, 2005). Corruption frustrates monetary

development, hinders institutional advancement, dissolves the state, and conveys huge political expenses in Russia (Sharafutdinova, 2010).

Corruption is a critical issue of Russian political and social life which plays a role of backbone in terms of worsens the economic growth (Roaf, 2000). Shockingly, it is not a cutting edge wonder. Around then debasement was seen as an extremely key some portion of ordinary life, not as a sort of an inescapable malice but rather a working a portion of State hardware. Bribery is ubiquitous in the business community of Russia (Safavian, Graham, & Gonzalez-Vega, 2001). Nationals and workers valued the straightforward certainty a right pay off was a key to alluring political choice.

Corruption is strongly affecting the small-medium enterprises (SMEs) in Russia (Safavian, Graham, & Gonzalez-Vega, 2001). FDI is robustly upsetting by corruption in Russia (Ledyeva, Karhunen, & Kosonen, 2013). Foreign ownership is also disturbing by corruption in Russia (Karhunen & Ledyeva, 2012).

Putin is trying to reform the government and political policies of Russia in order to minimize the level of corruption (Treisman, 2002).

### DISCUSSION

The most important work regarding co-integration among counties was performed by Erdinc & Milla in 2009, in which they want to analyze the co-integration flanked by several stock markets of various European countries.

Is there any relationship exist among the development/decline of Asian countries? Sometime, countries in the world with almost same growth structure can use same variables of growth but it is hardly ever the case because the circumstances as well as government rules and regulations vary from country to country. Cooray, Paradiso, and Truglia (2013) terminate that the same variables for growth in same growing structure countries can't be roughly applicable because of disparity in their government rules and regulations. Each and every country in the world has specialized in some specific sectors industries, and fluctuations in the macro-economic variables may affect the different areas according to their environment in different manner. Pakistan deliberately found challenging geopolitical situations (Estrada, Park, Kim, & Khan, 2015).

Kelegama (2007) terminate that Asian countries must focus on their infrastructure and also stabilize their macro-economic fluctuations by making well-organized government policies and allocating governmental resources in a resourceful way.

Corruption is playing the role of biggest hurdle in economic development of each and every country. Corruption starts from misuse of bureaucratic and political powers, and its strongly affecting the governance of Asian countries (Bhagwan, 2007). Underprivileged democracy leads to corruption (Sun & Johnston, 2009). Host nation corruption demoralizes foreign direct investment (FDI) (Cuervo-Cazurra, 2006). Corruption is not a one-way process, it's a two-way process where one is bribe taker and other is bribe giver (Agrawal, 2007). There is an inverse relationship exists among corruption and the quality of governance (Ugur & Dasgupta, 2011). Corruption may start from the misuse of powers by government officials in any country (Powell, Manish, & Nair, 2010).

The data for this study are strained from "corruption perception index", "world economic database/world development indicators" by World Bank and some other financial data indices. The available data covers the period of 2001-2013 on an annual basis. The nominated progress-ornamental variables for this study are; economic growth in percentage of GDP (%), foreign direct investment in percentage of GDP (%), and corruption in terms of transparency. So as to attain the anticipated objectives, the study examines the inter-affiliations among "FDI and

Corruption”, “Economic Growth and Corruption”, and “FDI & Economic Growth with Corruption” on the basis of simple graphical studies. The literature demonstrates that corruption has an inverse relationship with economic growth and foreign direct investment too.

**Table 1**

**Data regarding CPI, FDI, & Economic Growth from 2001-2013**

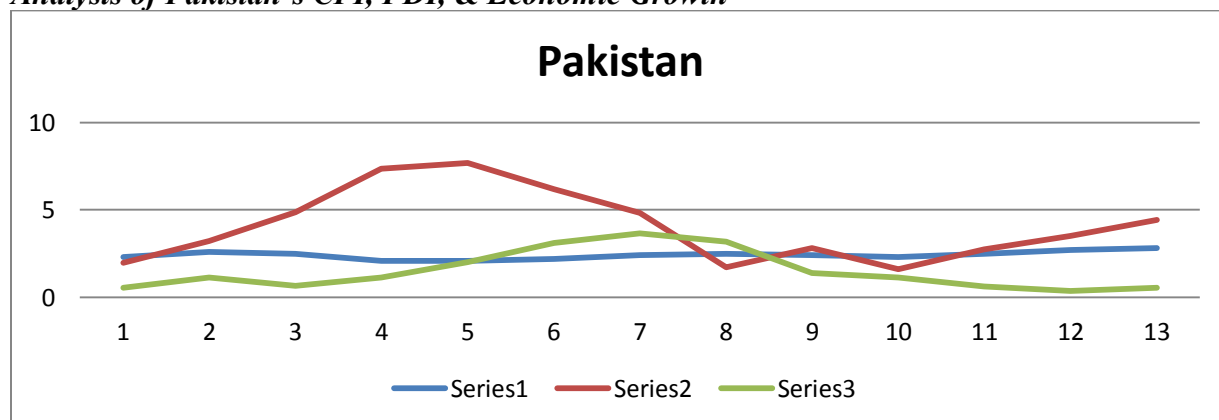
Variables	Countries								
	Pakistan			India			Russia		
	CPI	Economic Growth	FDI in % of GDP	CPI	Economic Growth	FDI in % of GDP	CPI	Economic Growth	FDI in % of GDP
<b>Years</b>									
2001	2.3	1.98	0.53	2.7	4.82	1.11	2.3	5.09	0.90
2002	2.6	3.22	1.14	2.7	3.80	1.07	2.7	4.74	1.00
2003	2.5	4.85	0.64	2.8	7.86	0.70	2.7	7.30	1.85
2004	2.1	7.37	1.14	2.8	7.92	0.80	2.8	7.18	2.61
2005	2.1	7.67	2.01	2.9	9.28	0.87	2.4	6.38	2.03
2006	2.2	6.18	3.11	3.3	9.26	2.11	2.5	8.15	3.80
2007	2.4	4.83	3.67	3.5	9.80	2.04	2.3	8.54	4.30
2008	2.5	1.70	3.20	3.4	3.89	3.55	2.1	5.25	4.50
2009	2.4	2.83	1.39	3.4	8.48	2.61	2.2	-7.82	2.99
2010	2.3	1.61	1.14	3.3	10.26	1.60	2.1	4.50	2.83
2011	2.5	2.75	0.61	3.3	6.64	1.98	2.4	4.26	2.89
2012	2.7	3.51	0.38	3.1	5.08	1.31	2.8	3.41	2.51
2013	2.8	4.41	0.56	3.6	6.90	1.50	2.8	1.34	3.37

In a given graphical data, 3 series are mention here, which are as follows:

- Series 1 => Corruption Perception Index (CPI)
- Series 2 => Economic Growth
- Series 3 => Foreign Direct Investment (FDI) in % of GDP

**Graph 1**

**Analysis of Pakistan’s CPI, FDI, & Economic Growth**



The above mentioned graph shows that from 2001-2013; according to series 1, Pakistan was in a continuous trouble in terms of transparency as Pakistan got 2.3/10 marks in 2001 and 2.8/10 in

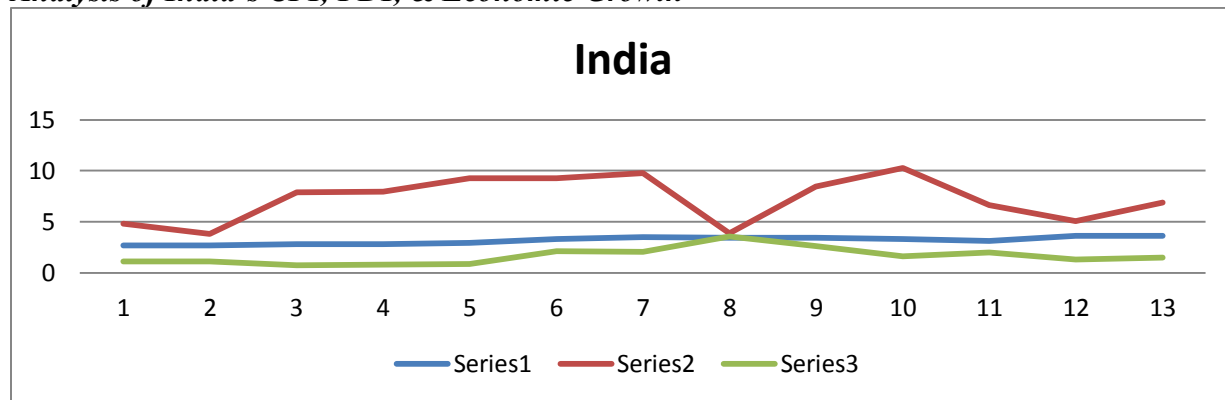
2013 which shows a lack of transparency and the graph also shows that Pakistan was in its worst situation in terms of transparency in the years 2004 & 2005 in which Pakistan got 2.1/10 marks and it was the ending tenure of Gen (R) Pervez Musharraf.

According to series 2, Pakistan was trying to foster its economic growth between the period of 2001-2013 as Pakistan was on 1.98 points in 2001 and 4.41 points in 2013 which is showing a good positive growth, but the graph also shows that Pakistan achieved its higher 'economic growth' level in years 2004 & 2005 with 7.37 & 7.67 points. During the years 2004 & 2005, financial recuperation has raised the apparent abundance of family units and along these lines supported certainty, prompting higher utilization. The resulting lifting of total interest thusly has impelled credit request. With expanded loaning, it has fortified more request, thusly sustaining over into financial movement and hence, mirroring a more extensive prudent circle. This positive prospect for customer interest, if maintained, will be an essential backing for the administration's major macroeconomic strategy focus for 2005-06.

According to series 3; Pakistan was trying to enhance its percentage of FDI during the period of 2001-2013 but Pakistan didn't achieve its goal in terms of FDI as Pakistan has a FDI of 0.53 % of GDP in 2001 and 0.56 % in 2013 which shows an extremely slow growth which is almost equal to zero growth level, but during the period of 2005-08 Pakistan achieved its maximum level of FDI as Pakistan was on 2.01-3.20 points in these years. Pakistan achieved its maximum of FDI in these years because large number of multinational firms entered in Pakistan between the periods of 2002-08. FDI has likewise developed as the real wellspring of private outer streams in Pakistan and additionally adding to the development of local altered capital arrangement. Fiscal year 2007-08 has been a troublesome year for foreign investment in creating nations in view of the emergency in the global money related markets.

### **Graph 2**

#### ***Analysis of India's CPI, FDI, & Economic Growth***



The above mentioned graph shows that from 2001-2013; according to series 1, India was in a continuous trouble in terms of transparency but it was trying to improve its accountability and transparency during this period as India got 2.7/10 marks in 2001 and 3.6/10 in 2013 which shows a minor improvement and the graph also shows that India was on right path in terms of transparency in the years between 2001-07 in which India was achieving continuous growth as India was on 2.7/10 points in 2001 and was on 3.5/10 points in 2007 and after that the declining period of India was started because India was on 3.1/10 points in 2012 but after that a sudden improvement India has achieved in 2013 with 3.6/10 points.

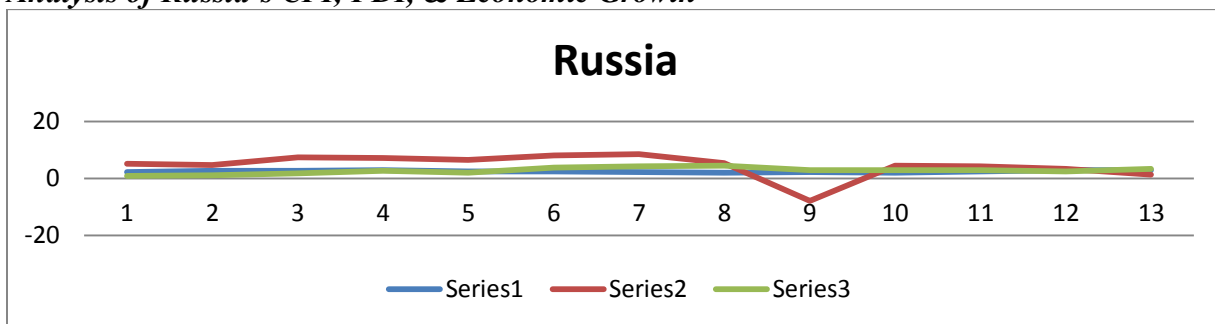
According to series 2, India was trying to foster its economic growth between the period of 2001-2013 as India was on 4.82 points in 2001 and 6.90 points in 2013 which is showing a slightly positive growth, but the graph also shows that India achieved its higher 'economic

growth' level in years 2007 & 2010 with 9.80 & 10.26 points, but the graph also shows that India was in its worst situation of 'economic growth' level in years 2007 & 2010 with 3.80 & 3.89 points.

According to series 3; India was trying to enhance its percentage of FDI during the period of 2001-2013 but India didn't achieve its goal in terms of FDI as India has a FDI of 1.11 % of GDP in 2001 and 1.50 % in 2013 which shows a very slow growth, but during the period of 2008 India achieved its maximum level of FDI as India was on 3.55 points in 2008. Since 2000, FDI saw an enormous bounce in India. As indicated by information, while in 2000 India pulled in FDI of \$4 billion just, in 2008-09, it went up to over \$27 billion. Portfolio interest in August additionally expanded by 56.2% to \$926 million contrasted with \$593 million in the comparing time of the most recent year. Amid the initial five months of year 2009, portfolio speculation expanded to \$11.23 billion from \$4 billion in the same period a year ago.

### Graph 3

#### Analysis of Russia's CPI, FDI, & Economic Growth



The above mentioned graph shows that from 2001-2013; according to series 1, Russia was in a continuous trouble in terms of transparency as Russia got 2.3/10 marks in 2001 and 2.8/10 in 2013 which shows a lack of transparency and the graph also shows that Russia was in its worst situation in terms of transparency during the year 2008 in which Russia got 2.1/10 marks. A universal conciliatory emergency in the middle of Georgia and Russia started in 2008, when Russia declared that it would no more take an interest in the Commonwealth of Independent States financial assents forced on Abkhazia in 1996 and built up direct relations with the separatist dominant voices in Abkhazia and South Ossetia. The emergency was connected to the push for Georgia to get a NATO Membership Action Plan and, by implication, the one-sided announcement of freedom.

According to series 2, Russia was trying to foster its economic growth between the period of 2001-2013 but Russia totally failed in this step as Russia was on 5.09 points in 2001 and 1.34 points in 2013 which is showing a poor decline in 'economic growth', but the graph also shows that Russia achieved its higher 'economic growth' level in years 2006 & 2007 with 8.15 & 8.54 points, but the graph also shows that Russia was in its worst situation of 'economic growth' level in the year 2009 with -7.82 points. The Great Recession in Russia was an emergency in the Russian money related markets and in addition a financial subsidence that was exacerbated by political reasons for alarm after the war with Georgia and by the falling cost of Urals substantial unrefined petroleum, which lost more than 70% of its worth since its record crest of US\$147 on 4 July 2008 preceding bouncing back modestly in 2009. As indicated by the World Bank, Russia's solid transient macroeconomic basics improved it arranged than numerous rising economies to manage the emergency, however its hidden auxiliary shortcomings and high reliance on the cost of a solitary thing had its effect more professed than would somehow be the situation. In late 2008 amid the onset of the emergency, Russian markets dove and more than \$1



trillion had been wiped off the estimation of Russia's shares, despite the fact that Russian stocks bounced back in 2009 turning into the world's best entertainers, with the 'Micex index' having dramatically increased in worth and recapturing a large portion of its 2008 misfortunes.

According to series 3; Russia was trying to enhance its percentage of FDI during the period of 2001-2013 and Russia slightly achieved its goal in terms of FDI as Russia has a FDI of 0.90 % of GDP in 2001 and 3.37 % in 2013 which shows a good growth, but during the period of 2007-08 Russia achieved its maximum level of FDI as Russia was on 4.3 & 4.5 points in these years. With the firm conviction that, particularly in Russia, past is preamble, the first and most vital monetary pattern of 2007 was that country's proceeded with political and financial strength. This has made conceivable, and will keep on empowering, dependable estimates of financial patterns, and has pulled in a lot of remote interest in Russia. One negative pattern of 2007 is the consistent ascent in costs of purchaser merchandise and food, an extremely risky improvement. The buyer cost file surged 12%, however the cost of specific foods has ascended at much quicker pace—vegetable oil increased by 150%, margarine by 40%, milk by 30%, and grains and bread by 25%.

### **CONCLUSION**

The literature suggested that there is strong association exist among 'corruption and economic growth' as well as 'corruption and FDI' but this is not the case all the time because of global socio-economic and socio-political spillovers.

#### ***Pakistan***

Pakistan practiced fast monetary and human capital development in years 2000 to 2008 on President Pervez Musharraf's tenure. Funds, speculations and sends out hit new records and the rate of expansion in human improvement came to new highs not seen before or since this period. Residential reserve funds rate came to 18% of the GDP and remote direct speculation (FDI) hit a record level of \$5.4 billion in 2007-8. This mix of local and outside ventures almost tripled the span of the economy from \$60 billion in 1999 to \$170 billion in 2007, as indicated by IMF. Exports almost tripled from about \$7 billion in 1999-2000 to \$22 billion in 2007-2008, including a large number of more occupations. "Pakistan's economy saw a noteworthy monetary change in the most recent decade. The nation's genuine GDP expanded from \$60 billion to \$170 billion, with per capita salary ascending from under \$500 to over \$1000 amid 2000-07". It further recognized that "the volume of global exchange expanded from \$20 billion to about \$60 billion. The enhanced macroeconomic execution empowered Pakistan to re-enter the universal capital markets in the mid-2000s. Vast capital inflows financed the present record deficiency and added to an expansion in gross authority stores to \$14.3 billion at end-June 2007."

#### ***India***

Will the worldwide budgetary emergency influence the inflow of remote cash-flow to India? The stake is gigantic. For, the backing off of standards for outside direct venture (FDI), particularly, outer business borrowings (ECB), throughout the years has prompted an emotional ascent in the inflow of remote capital. Corporate India's reliance on outside capital too has expanded generously. Total FDI inflows expanded 30% in 2007 more than 2006. Amid January-July 2008, FDI inflows have expanded more than more than two times over the same period in 2007. That India's venture exercises lately have to a great extent been financed by outside sources may be found in the sharp ascent in FDI inflows. Total inflow of FDI has expanded almost seven times amid 2002-08 from Rs 95,639 crore in 2003 to Rs 6, 54,949 crore in 2007.

#### ***Russia***

Neediness decrease and white collar class development in Russia were clarified by high development in normal salaries and utilization amid the time of 2000-2010. The destitution rate tumbled down from 35 percent in 2001 to 10 percent in 2010. In the meantime, the span of the white collar class developed from 30 percent to 60 percent of the aggregate populace. Be that as it may, weaker development prospects and balancing out utilization at a lower rate diminish the monetary portability viewpoint. Financial variables, for example, the pay development and access to great, beneficial occupations, as opposed to the demographic elements drove the working class development in Russia. In any case, in the flow environment of a much slower financial development and compelled monetary assets, work creation will be a vital condition for the future financial versatility, and also to strengthen the part of work pay as the primary driver of the center wage development. Russia's general exchange surplus in 2007 was \$132 billion, generally equivalent to the \$139 billion surplus in 2006. World costs keep on majorly affecting fare execution, since products - especially oil, common gas, metals, and timber- - include the majority of Russian fares. Russian GDP development and the excess/shortage in the Russian Federation state spending plan are firmly connected to world oil costs. The U.S. traded \$7.4 billion in products to Russia in 2007, a 57% expansion from the earlier year. Comparing U.S. imports from Russia were \$19.4 billion, down a slight 2%. Russia was the twentieth biggest fare market for U.S. products.

### **Recommendations**

Each and everything in this world has advantages and disadvantages, but the proportion of each and everything is change with respect to the circumstances and characteristics.

In the context of corruption, the managerial and organizational deficiencies may arise at the time of corruption's removal (Silverman, 1998). The controlling corruption strategy may start from satisfying the internal customers (employees) of the organizations (Lange, 2008). By improving the level of governance, a state can control its level of corruption (Apaza, 2009). By improving timely accountability sessions, a government can also regulate the corruption (Findlay, 1993). The routine corruption can be controlled by proper check and balance of political and government activities (Manion, 1997). Corruption is based on the individual personality but it can be controlled to some extent by organizational reforms (Martin, Johnson, & Cullen, 2009).

In general, there is a direct association exist among financial development and economic growth (Samargandi, Fidrmuc, & Ghosh, 2015; Ductor & Grechyna, 2015). Economic growth of the state leads to the higher living standard of the people (Midgley, 1999). Industrial development is one of the core objectives behind the economic growth of any state (Aparicio, Urbano, & Audretsch, 2015). Infrastructure of the state may also play a very important role in terms of improving economic growth (Bougheas, Demetriades, & Mamuneas, 2000). The economic growth of any state is directly associated with foreign direct investment (FDI), and it can also strengthen the global economy (Iamsiraroj, 2016; Rahman, Mustafa, Islam, & Guru-Gharana, 2006; Wijeweera, Villano, & Dollery, 2010). By strengthening the democracy a state can boost-up its economic growth (Salahodjaev, 2015; Heo & Tan, 2001) because weak democracy may adversely affect the economic growth (Rachdi & Saidi, 2015; Heo & Tan, 2001). In order to strengthen the economic situation, a state should avoid economy's downsizing (Haapanen & Tapio, 2016). For firming the economic situation of the country, a strong governance is required which can be achieved through economic transformation in the perspective of public institutions (Evans & Rauch, 1999). In most of the countries, the crime rate is very much high which is adversely affecting the economic growth of those states (Goulas & Zervoyianni, 2015).

FDI is the most significant growth factor for developing economies (Delgado, McCloud, & Kumbhakar, 2014; Wickramasinghe, 2007; Szkorupová, 2015). Brewer in 1993 concludes that on the basis of reforms in government policies, a state can achieve a sustainable level of FDI and on the basis of these reforms a factor of corruption can be controlled (Habib & Zurawicki, 2002). One of the most significant ways to achieve a sustainable level of FDI is technological development (Papanastassiou, 2009).

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## **ERP Best-of Breed Solutions Enabling JIT Adoption Real Success in Real World**

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### **Abstract**

Minimization of inventory management costs is a primary driver and benefit of just-in-time practices. There is always a claim that Just-in-Time is not applicable in real world. Bearing into consideration the fluctuated logistics pattern of suppliers, this inspire most of industry key players to have an inventory buffer as 'critical asset of success' to ensure a smooth pattern of supplies provided and production in-time delivery. This research trigger a real implementation of one of ERP top-vendor solutions and showed the applicability to be combined with just-in-time adoption for inventory elimination & demand variability management. The empirical study conducted in this research provides future implications for theoretical framework that assume persistently the inapplicability of just-in-time adoption.

### **Introduction**

ERP is considered as an important approach in information technology which provides solutions to organizations. It collects data from different departments across organization regardless its size (SME, medium and large) and kind and stores it in single database. According to Maditions, et al., 2011, ERP system must considered as an integrated business system across organization departments not only considered as information system. ERP can be used to integrate external applications with collaborative commerce arrangements, supply chain and e-business (Payne, 2002).

The implementation of ERP is beneficial to organization as follows: It allows different departments to share information's this leads to improvement of coordination across departments (Payne, 2002)( Amoako-Gyamph, 2007; King, 2005). It allows the automations of paper based process which leads to increasing efficiency. (Payne, 2002, Amoako-Gyamph, 2007; King, 2005; Umble et al., 2003). It can control the process which allows customer to adjust business process that satisfies his needs. Also identify the employees who placed the order. (Payne, 2002)(Rao, 2000). It reduces error made by employees in input data. (Payne, 2002). Enhance productivity and working quality. (Maditions, et al., 2011), provide flexibility assurance in least time. (Gupta, 2000), helps in supporting strategic planning by planning the available resources. (Al mashari et al., 2003; Amoako-Gyamph, 2007; Chang, 2004; King, 2005; Scott and Kaindl, 2000; Umble et al., 2003), Allows organization to standardize their business process and systems (Cooke and Peterson, 1998, keller and Teufel, 1998; Rick, 1997), It decrease various types of cost like decreasing production cost, decreasing marketing cost, decreasing inventory cost, decreasing help desk support cost. (Al mashari et al., 2003; Amoako-Gyamph, 2007; Chang, 2004; King, 2005; Scott and Kaindl, 2000; Umble et al., 2003), Assist the day to day management. (Al mashari et al., 2003; Amoako-Gyamph, 2007; Chang, 2004; King, 2005; Scott and Kaindl, 2000; Umble et al., 2003). ERP systems are also being used in the small and medium enterprise as maintaining competitive advantage (Huseyin et al, 2014), (Huseyin et al, 2015). ERP implementation for SMEs has a great impact for cost savings and operational



improvements. This helps companies survive and thrive in these difficult economic times. Many challenges face SMEs to cope with competitive environment and undertake IT investment decision that fit with SMS capacities. The undertake decision to enhance SME performance should be analyzed the specific characteristics to fit within the capacities. The process includes a complex multi criteria decision situation that requires the involvement of a group of decision makers. Huseyin et al. (2014) conducted an application case on the ERP selection problem for the Small Medium Enterprises (SMEs) in Turkey. The proposed hybrid methodology defined the best ERP system based on the information gathered in the study. Following are advantages of adopting ERP in SMEs:

- a. Increased Productivity
- b. Streamlined Data Flow
- c. Better Collaboration
- d. Decreased Operating Costs
- e. Delivery of Business Insights
- f. Improved Decision-Making

Although there are many advantage for ERP implementation as illustrated before it is still not always effective; there are main Limitations for ERP implementations which can leads to failure; (Payne, 2002) which are the complexity and cost of adoption as well as unplanned cost for new requirements (Al mashari et al., 2003). It takes a lot of time for full implementation; this affects the employees' incentives. Complete adoption requires high cost to support it. A survey done by Marnewick and Labuschagne (2005) stated that 25 percent of ERP implementations exceed the initial cost and about 20 percent cannot be completed.

Katerattanakul et al. (2014) in this study did investigate ERP literature to define critical factors related to ERP adoption approaches and business characteristics manufacturer perspectives. The study conducted empirical study to end-up if manufacturers with common business characteristics and ERP adoption approaches would get diversified scenario of ERP adoption employing cluster analysis. The study concluded three clusters or groups of manufacturing firms without significant impact of ERP implementation approaches affected with. Two business characteristics are effective on ERP adoption success scenario: Company size and production approaches. The study proves as well that large manufacturer adopting customization approach had entitled apparent benefits from adopting ERP systems. Hasan et al. (2011) did conduct a study for the purpose of figuring-out why do Australian manufacturer adopt enterprise resource planning (ERP) systems and experienced challenges faced during the implementation phases. The study did conclude that the Australian manufacturers (regardless it's organizational size) use or willing to use ERP extensively. Getting a real-time accurate information of organizational activities has been highlighted as one of significant study outcome.

Ram and Corkindale (2014) conducted a study focusing on assessing the critical success factors (CSFs) of enterprise resource planning (ERP) adoption. The study reviewed around 627 refereed papers published between 1998 and 2010 on ERP. The authors have shown that a limited number of CSFs have been empirically tested to detect it's effect on implementation success or post-implementation performance outcomes.

Hwang and Min (2015) did an empirical study to identify drivers that enable or obstruct the implementation of ERP & its role on supply chain activities and performances. The ERP

implementation decision is influenced by the internal environment. The external environment has little influence on its decision to adopt and implement ERP.

Beheshti et al. (2014) decided to focus on successful enablement of enterprise resource planning (ERP) systems in manufacturer firms to reduce redundancy, improve efficiency, productivity and performance. The ERP most favorable perception is to provide the enterprise with responsiveness advantage toward order fulfillment.

Huang et al (2009) did a study with the purpose of investigating the efficiency and profitability of enterprise resource planning (ERP) pre-and post-adoption in the long term. The paper also aims to examine the factors of ERP supplier types and firm size in Taiwan. ERP profitability is confirmed on long-term. The findings did recommend the use of Ready-made package of ERP over local customized packages due to its positive impact of business performance

Payne, 2002 identified away to decrease the implementation cost through ERP linking into collaborative commerce; which allows cost sharing and using channels with lower inherent costs. Best of breed (opt) software is an alternative of ERP in decreasing cost of implementation but will not achieve same level of integration as ERP do. Where Chan, 1999 developed an economic model of ERP life cycle cost to choose the best time to upgrade or implement ERP. Umar and Missier, 1999 identified knowledge based decision workbench tool used to decrease time and effort spent in integration of ERP; it helps users to choose the applicable software and plan for implementation project.

Another limitation is ERP systems often fail to meet organizational goals soon after their implementation Marnewick and Labuschagne (2005). Where employees' resistance to change; employees are unwilling to learn and use new technology. Also poor training for end user; they don't know how to use and maintain it is another limitation that should be taken into consideration (Gupta, 2000).

Payne, 2002 provide a solution to increase efficiency of service to customer can be done through integration of ERP with customer relationship management systems (CRM). Since CRM is an approach for building and maintain long term relationship between organization and its customers.

In the previous section the benefits and limitation of ERP implementation have been identifies. This section describes from where to starts to learn and educate about ERP concept. Elam et al. (1999) described an educational strategy for ERP which starts from understanding the business process, integrates management and technology skills and using ERP as enabler tool for cross functional education. Also Wang and Chen 2006, stated that in order to achieve successful ERP implementation you have to retain an effective consulting process. Since consultant support and knowledge transfer considered as main factors for ERP successful implementation. The consultant improves the performance of ERP system through their experience and effective sharing of knowledge among different departments. (Maditions et. Al., 2011). Where Gibbon, G. and Aisbett, J., 1999 stated that the education should starts by understanding the history of business information requirements. Also Hawking et al. 1999 identified approach to integrate teaching ERP in IS 1997 curriculum module. In addition those system users should learn their new responsibilities toward their organizations (Maditions et. Al., 2011)

### **Importance of Automation of Procurement Cycle**

Within existing competitive environment, Firms are transforming their business process to be more agile-oriented, Organizations are trying to optimize the delivery time while minimizing cost. Procurement cycle is extremely critical to strategy formulation (Moses, 2011). Managing the supply chain partners in more effective pattern optimize organizational performance (Collins et al. ,2010), (Ragu et. al, 2006). The procurement cycle is the cornerstone of supply chain management. The significance of supply chain related activities is evident with 70% of total organizational revenues. (Patrick et al, 2014). Many research conducted in procurement domain focusing on different issue and supplier selection is key one investigated in. For instance, Arpan and Ashis (2014) conducted research to indicate main criteria of critical importance to Indian manufacturing industries. The use of e-procurement platforms is highlighted as well as key finding of organizational studies.

The role of information technology usage in SCM has been investigated intensively (Patrick et al, 2014), (R. Batenburg and J. Versendaal, 2008), (W. D. Presutti Jr ,2003) . Those researches ended-up with proving a number of advantages of using electronic procurement systems, such as reduced procurement costs, shorter delivery times, enhanced quality and managing the relationships with suppliers in more effective pattern (K. Eyholzer and D. Hunziker, 2000), (M. Beukers et al., 2006).

Further more research focuses on key enablement of adoption of electronic adoption procurement systems (C. Zhang and J. Dhaliwal, 2009), (Patterson et al., 2003). However, most research studies regarding electronic procurement are still explaining adoption enablers with quantitative studies of post-adoption performance contributors (Teo and K. h. Lai, 2009). Consequently, this research focuses on outcome of adopting electronic procurement system.

### **ERP Success Case Study**

Case study of luxurious automaker which considered as one of the world's best auto-makers with luxury sedans, and sports cars. It's ultimate goal is to focus on engineering excellence which is allied to leading-edge design and endures to safe drive and end-up with profitable expansion. It considered as one of the "German Big 3" luxury automakers which are the three best-selling luxurious car worldwide.

The plant is placed in key industrial zone of Cairo. It's established a newly innovated plant in the middle east region that will enable the assembly cycle for modern car with high quality standard for automaking industry. It's annual production capacity is 8,000 units of different models and brands. The automake commit with the requirement for a continuous quality management system for the purchase and procurement of production material which is in referral to the specifications of the international standards ISO 9000 and ISO/TS 16949 and HQ specifications.

The procurement procedures have to be implemented under the following circumstances:

- new product developments;
- modified or new processes;
- use of new production plants, production facilities, tools, technologies, materials;
- new production location, production re-location.

The relationship with suppliers is based on partnership and Trust. In the supplier selection process, potential suppliers agrees on The company's requirements in terms of specifications, innovations, quality, and cost. This sets the basis for a successful and mutually beneficial partnership.

Selection of Suppliers are selected across a number of project phases, depending on the scope of service being contracted out and on the type of supplier. The Purchasing and Supplier Network Division is responsible for successful supplier selection and contract drafting. Then the Purchasing is supported by Development, Parts Quality Management, and Logistics “Clover Leaf” arrangement. The automaker set the Supplier selection criteria based on two stages of supplier selection:

- Product innovation and strength of concepts
- Product quality / robust production processes
- Lifetime costs
- Delivery process capability and on-time delivery
- Project management
- Value creation chain / subcontractor management

Following-up with the procurement cycle is triggered by the following:

- Clearly stated requirements,
- Agreed targets,
- Achievable objectives,
- Compatible terms and conditions

The supplier selection decision will be taken by the automaker on the basis of the suppliers’ project proposals and plans in all the areas identified above. The selection of automaker suppliers is decided in even two way:

**First option:** If the supplier is already known, the decision will be taken in-accordance to the demonstrated capability.

**Second Option:** Newly Supplier evaluation is carried out by Purchasing, Parts Quality Management, Logistics, and Development. Supplier contracting” in accordance to following types of agreement:

- Confidentiality agreement,
- Development contract,
- Warranty agreement,
- Supply contract,
- Combined development / supply contract,
- Requirements specification
- Service Level Agreement (SLA) / QMT Requirements
- Scope of service and logistics (LLQs).

Procurement cycle run for different components and spare parts as follow:

1-Related Engine Parts & Lubricant:

- Including what is called ‘Powertrain’,
- the transmission, both front and rear axles
- Necessary fluid such as radiator, power steering and coolants among other fluids are added to the engine.

2-The gearbox and suspension

3-The chassis and other metal related components such as doors, frames & roofs.

4-Related painting materials such as colors and pre-treatment materials.

5-Related interior components such as car seats and cockpits.

To manage the demand variability effectively, the management commit with Just-In-Time inventory strategy. The supplier is committed to provide large trailers are mounted at the large entrance doors as soon as a specific component is needed. In order to reduce waste, the management strongly feels that inventory buffer should only be in the amount needed. Each stage in the manufacturing process has one trailer full of components needed in that stage.

This inventory is moved from the specific trailer (all trailers are located in one area) to the station as before the chassis begins to move on to the assembly line from one stage to another. By the beginning of the assembly, a front load inventory is usually made available in order to maintain a pace. To manage the enormous complexity, reliable coordination of parts production processes is vital. The pre-assembled model-specific components and component groups such as engines, seats or cockpits are sent to the main assembly line in the precise order needed – specialists call this "just-in-sequence".

### **Information System supporting the Procurement cycle**

The automaker choose one of well-known packages of SAP solutions to automate the procurement & purchase cycle. The Ariba solution is used in the technical purchasing unit of BMW Group which is a B2B e-commerce platform allows the automobile manufacturer to optimize business processes and to incorporate suppliers into the electronic procurement system worldwide. It is responsible for obtaining indirect goods such as investment goods, services and overhead goods. The use of the well-known solution is intended to reduce the administrative aspects of obtaining MRO goods (maintenance, repair, operating).

In the first stage, catalogues for the procurement of office material, electrical installations and tools were incorporated into the system. During the changeover, European and international standards are met, so that the system can be expanded anyway. Ten diversified catalogues of around from various suppliers will be released shortly, a supplementary six more catalogues will be included monthly until the end of year. It will then be possible to organize services such as painting work via the web-based solutions. The system manages closely to coordinate with series of purchases in order to achieve the maximum synergies.

The solution handle large number of transactions, each relatively is low -order value. Through existing framework agreements with suppliers, those purchases can be transacted using the electronic platform to manage efficiently around 90 percent of transactions

It's obvious to the management that the changeover to electronic procurement solution saves time. Usually, the purchasing unit employees spent around 60 minutes on average on one procurement transaction, from ordering to checking the invoice. Once the e-commerce platform is in use, the entire cycle will take less than 20 minutes on average. The management admitted that "This results is for purpose of process improvements and time savings for both side: automaker & suppliers involved, which is a win-win situation"

The customized solution of mySAPTM Automotive- help the automaker to receives custom-configured manufacturing orders from the planning system. The orders include detailed car-components required to fulfill the incoming order. The automaker used to tune the solution to sends the long-term forecasts combined with short-term JIT delivery schedules to the suppliers. Suppliers receive the detailed plan via electronic data interchange (EDI) to respond accordingly. Suppliers can log-in as well to mySAP Automotive Supplier Portal, where the automaker posts the requirements to provide up-to-date information on its delivery needs.

Launching to one-desktop screen using internet browser, suppliers can view updated information in real time, including release schedules, purchasing documents, invoices, and engineering documents. Whenever the parts shipped, the suppliers send shipping notifications (ASNs) to provide the automaker with exact information on parts counts and delivery scheduled. Parts arriving at the automaker dock are transferred directly to the assembly line.

### **Discussion & Conclusion**

This empirical study provides a real evidence of how can the right usage of best-of-breed solution can lead to supply chain streamlining. Commonly, Managing the procurement cycle of automotive industry involve many process complexity. To avoid so, the industry key player did use to overcome such complication in accordance to demand variability with keeping further inventory buffer. Consequently, this led to undesirable outcome on inventory buffer and reflecting in further expenses. To manage a successful business, the management compromises between the expenses and incoming order forecast. While it's not easy to have a concise forecast over the demand, the use of ERP solution and feeding such solutions with realistic pattern of demand could achieve this goal and streamline the procurement complexity to have more controlled pattern of supplies and rational buffer of inventory that can fit well with forecast. Adopting JIT can provide a faster turnaround of stock, reduce the overhead expenses and unblock Waste reduction. The just-in-time inventory model will provide with a greater level of control over the entire manufacturing process and enable to respond quickly for customers change.

Managing JIT limitations are the real challenges of ERP solutions adoption. It's essential to provide a precise perdition of market demand which consistently fluctuates for most industries. Permitting JIT will have slow dispatches if the logistics flow is not reliable or the supplier are not highly committed with delivery scheduled timings in which will consequently affect customer satisfaction ratio.

The shift from traditional supply chain to lean implies much consideration. The lean paradigm embrace streamlining business processes by eliminating waste and non-value added activities. The just-in-time could fit well in these aspects to ensure the inventory reduction and velocity while it's business challenge to manage the demand velocity and variation supplier performance and control the lead times. This research provides essence for Theory and practice. Most of researches this stress on effective inventory management and impact of JIT adoption but in fact it's a challenging theory to apply. Moving to lean supply chain is applicable when business could take control of order prediction and can manage the demand variability. Furthermore investigation of ERP implementation implications and complications on SMEs should be considered for further researches.

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## How Does Body Image Dissatisfaction Affect Adolescent Girls' Self-Esteem Level? The Case of China

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### Abstract

This research examined whether there is any causal relationship between body image dissatisfaction and low self-esteem level. Participants were all women with 268 adolescent girls and 68 non-adolescent women. The methodologies we use are logistic regression model, along with the Altonji's bounding technique. The logistic regression results show that adolescent girls are more likely to be negatively affected by their body image dissatisfaction (about 6 percent more likely) compared to other cohorts. Considering there might be selection bias to the estimates, we further use Altonji's bounding technique. Once implementing Altonji's bounding technique, we find that the body dissatisfaction can make adolescent girls' self-esteem even lower (about 8 percent lower) than other cohorts. These findings are consistent with the hypothesis that body dissatisfaction is a risk factor for depressive mood in adolescent girls. Our results support calls for early educational intervention to help early-adolescent girls to adopt a correct attitude toward their body images.

**Key Words:** Chinese Gender Study, Body-image dissatisfaction, Self-esteem, Adolescent girls, Altonji's Bounding Technique

### 1. Introduction

Existing literature shows that in Western cultures, body image dissatisfaction prospectively predicts depressive mood and low self-esteem in adolescent girls and boys, especially the early-adolescent girls (Gupta, 2011; Cash, 2002; Cusumano, Thompson, 1997; Paxton, Sztainer, Hannan, Eisenberg, 2006; Clay, Vignols, Helga, 2005). We, as Chinese researchers of Gender Study are eager to examine whether this phenomenon is also true in Eastern countries, like China.

As Chinese researchers, we believe that this phenomenon is more likely to be true in China. China has a long history of stereotype toward women. Since China had a one child policy back in 1980s and believes that males are better than females, when female child was being conceived, they will abort female child to try again for male child. In China, women are more likely to be considered as not strong enough as men, not as intelligent enough as men. For school age youth, people always think that girls are better at literature and humanity as their majors, instead of Science.

Women who grew up in this environment are more likely to have low self-esteem, especially when they have bad academic performance at school or had been unsatisfied with their body images. Therefore, we as Chinese researchers of Gender Study aim to find if there is any causal

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relationship between body image dissatisfaction and low self-esteem, especially for the youth who reach their adolescent age.

Most of the existing literature had a conclusion that in Western countries, depressive mood and low self-acceptance can be predicted by ones' self-rated body image dissatisfaction level in adolescent girls and boys, especially the early-adolescent girls (Gupta, 2011; Paxton, Sztainer, Hannan, Eisenberg, 2006; Clay, Vignols, Helga, 2005). Female adolescents reported more depressive symptoms, self-consciousness, stressful recent event, feminine attributes, and negative body image and self-esteem (Allgood-Merten, Lewinsohn and Hope, 1990). Girls reported on average higher depressed mood levels and more negative body image than boys at all ages (Holsen, Kraft and Roysamb, 2001). A direct relationship has been found between body image and depression and low self-esteem (Pingitore, Spring and Garfield, 1997). However, there are no sufficient study regarding this search area in China. And therefore, this is one of our major contribution of current research to fill this gap and examine whether there is any causal relationship between body image dissatisfaction and low self-esteem for adolescent girls comparing to other cohorts.

In this article, we conduct an empirical investigation by using our own survey data to examine how significant the impact of body image dissatisfaction might have on Chinese girls' self-esteem. It is worth noting that the students' academic performance and other socioeconomic variables, such as parents' education level and family income also play critical roles in the teenage girls' degree of self-esteem. Therefore, we are expecting that adolescent girls from the affluent family with high social-economic status are more likely to feel confident, and adolescent girls from the less affluent family with low social-economic status will be more likely to have low self-esteem than their corresponding counterparts. We examine the effect of body dissatisfaction by controlling for their school performance and other socioeconomic variables in the regression analysis.

The rest of the paper is organized as follows. Section 2 and 3 describe our survey data and empirical strategy. Section 4 presents the estimation results. Section 5 concludes the paper.

## 2. Data

### 2.1 Data source and survey sample

The data comes from our own survey data. We created a questionnaire and posted it online. Most participants (about 89 percent of the participants) are in Taiyan City, located in Shanxi Province in China. Sample questions in the questionnaire include: gender, age, city of residence, parents' highest education level, current academic performance, how satisfied with your own body image, on the whole, whether you are satisfied with yourself, how do you value other people's opinions of you, whether you think men are more intelligent than women and etc. Participants are expected to answer all the questions in the survey and submit online when they have done with all the questions. Within half a year of data collection, we collected 336 all-female observations. Among these female participants, about 79% (268 observations) are of their adolescent ages<sup>34</sup> and 21% of the observations are non-adolescent females.

### 2.2 Measures

**Self-esteem.** To assess self-esteem, we modified Rosenberg's (1965) self-esteem scale, a ten-item measure using five-point scales ranging from strongly disagree (0) to strongly agree (4). Self-esteem is assessed through agreement with global self-evaluative statements such as "On the whole, I am satisfied with myself." In this study, we use dummy variable for each participant's

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<sup>34</sup> Definition of adolescent age youth: age between 10 and 20 years of age, according to Kling, Hyde, Showers, & Buswell, 1999

self-esteem level: whether the participants have strong self-esteem. This dummy variable regarding people's self-esteem level is our independent variable we use in our regression equation.

**Body image Satisfaction.** Body image satisfaction was measured using the survey question "By how much degree most people would consider me as good looking". We adopted the appearance evaluation subscale of the multidimensional body-self relations questionnaire developed by Cash (see Brown, Cash, & Mikulka, 1990). This seven-item scale assesses evaluative body image on five-point Likert scales, ranging from definitely disagree (1) to definitely agree (5). An example item is "Most people would consider me good looking." In the present study, we only consider the dummy variable for this measure, which is whether the participant satisfied with their body image. People self-reported from 1-3 are considered as not satisfied; while 4-5 are considered as satisfied with their body image. This dummy variable is the independent variable that we are most interested in for our regression part.

**Participants' family Social-economic status.** We use parents' highest education level for each of participants to represent the family Social-economic status for each corresponding participant, which is one of our independent variable we used in the later regression analysis (Shi, 2016). We expect that for a person with higher Social-economic status will be less likely to have low level of self-esteem, comparing to those with low Social-economic status.

**Academic Performance.** Due to the unique Chinese social circumstance, students usually have pressure upon their schoolwork. Additionally, as only children the students are mentally fragile especially they have the schoolwork pressure in the same time, this has given rise to many self-esteem problems in students. Considering this special Chinese status quo, we include the academic performance question in our questionnaire. We asked students whether they do well in school. We still use four-point scales ranging from very poor (0) to excellent (4).

Table 1 below shows the summary statistics of the information about the all our 336 participants in this study.

**Table 1: Summary Statistics of the information about all 336 female participants**

<b>Age:</b>	
268 Adolescent Girls	68 Non-Adolescent Girls
<b>Parents' Highest Education Level:</b>	
157 Bachelor degrees and above	178 High school degrees and below
<b>Academic Performance:</b>	
171 Average and above	164 Below average
<b>Body Image Satisfaction:</b>	
233 dissatisfactions	102 satisfactions

### 3. Empirical Strategy

#### 3.1 Logistic regression analysis

The goal of our empirical strategy is to estimate the causal effect of the feelings of dissatisfaction with one's own body image on people's self-esteem level. More specifically, we are examining how possible the women with dissatisfaction on their body image tend to have low self-esteem. To do so, we first estimate the following logistic regression model for each participant  $i$ :

$$\text{Logit}(E[Y^*_i|X_1, \dots, X_m]) = \text{logit}[(\text{Self-esteem})_i = 1|X] = \text{logit}(\pi_i/1-\pi_i) = \Phi(X' \beta)$$

$$= \Phi [ \beta_0 + \beta_1 X_{\text{body-satisfaction}} + \beta_2 X_{\text{age}} + \beta_3 X_{\text{grade}} + \beta_4 X_{\text{SES}} + \mu_i ] \quad (1)$$

In the specification above,  $\Phi$  represents the cumulative distribution of a logistic random variable. The dependent/outcome variable (Self-esteem)<sub>i</sub> for the analyses is the self-esteem status for each participant *i*. The question about the self-esteem status has been asked of each individual in the survey. The individual who answered “disagree” and “strongly disagree” to the question “On the whole, I am satisfied with myself” is coded as “1” and other answers are coded as “0”. Those who answered “don’t know” and “not available” were coded as missing value in our sample. Since equation (1) is a logistic regression model, the left-hand side of the equation measures the probability of participant’s self-esteem level under study.

For independent variables, we include four dummy variables:  $X_{\text{body-satisfaction}}$ ,  $X_{\text{age}}$ ,  $X_{\text{grade}}$ ,  $X_{\text{SES}}$ .  $X_{\text{body-satisfaction}}$  is a dummy variable for whether the participant satisfies with her body image. The individual who answered “disagree” and “strongly disagree” to the question “Most people would consider me good looking” is coded as “1” and other answers are coded as “0”.  $X_{\text{age}}$  is a dummy variable for whether the participant is in her adolescent age period. For adolescent female, we coded as “1”, others are coded as “0”.  $X_{\text{grade}}$  is also a dummy variable for whether the participant has good academic performance. The individual who answered “below average” and “poor” to the question “how do you feel like your current academic performance” is coded as “1” and other answer are coded as “0”.  $X_{\text{SES}}$  is a dummy variable for whether the participant has financially well family background. The individual who answered “below bachelor” to the question “what is your parents’ highest education level” is coded as “1” and for the bachelor and above education levels, we code them as “0”.  $\mu_i$  is the standard error term.

### 3.2 Altonji’s Bonding Technique

Although we have taken the relative observable factors into consideration, it is still possible that there are some other factors that can affect women’s self-esteem. To deal with the selection bias, we adopt Altonji’s bounding technique to estimate the selection bias caused by those unobservable variables because it is an estimation methods based on the idea that the amount of selection on the observed explanatory variables in a model provides a guide to the amount of selection on the unobservable (Altonji, J.G., Elder, T.E. & Taber, C.R., 2005).

As follows, we briefly discuss the theoretical foundation for using the relationship between an endogenous variable and the observables to make inferences about the relationship between the variable and the unobservables. Let the outcome of interest  $O^*$  be a function of a latent variable  $O^*$ , which is determined as:

$$O^* = \alpha \text{ Treatment} + X' \Gamma x + \varepsilon \quad (2)$$

Where,  $\text{Treatment}$  is an indicator for whether the household received any social assistance, the parameter  $\alpha$  is the causal effect of treatment on  $O^*$ ,  $X$  is a vector of the observable variables that determine  $O^*$ ,  $\Gamma x$  is the corresponding coefficient of  $X$ , and the error component  $\varepsilon$  is an index of the unobserved variables. Because it is unlikely that the control variables  $X$  are all unrelated to  $\varepsilon$ , we work with:

$$O^* = \alpha \text{ Treatment} + X' \gamma + v \quad (3)$$

Where,  $\gamma$  and  $v$  are defined so that  $\text{Cov}(v, X) = 0$ . Consequently,  $\gamma$  captures both the direct effect of  $X$  on  $O^*$ ,  $\Gamma x$ , and the relationship between  $X$  and  $\varepsilon$ .

To argue the role of selection bias in a simple way, we ignore the fact that  $O$  is estimated by a probit or logistic regression and treat  $\alpha$  as though it were estimated by a regression of the latent variable  $O^*$  on  $X$  and  $\text{Treatment}$ . Let  $X' \beta$  and  $\text{Treatment}$  represent the predicted value and residuals of a regression of  $\text{Treatment}$  on  $X$  so that  $\text{Treatment} = X' \beta + \text{Treatment}$ . Then

$$O^* = \alpha \overline{Treatment} + X'(\gamma + \alpha\beta) + v. \quad (4)$$

If the bias in a probit or logit regression is close to the bias in OLS applied to the model (5), then the fact that  $\overline{Treatment}$  is orthogonal to  $X$  leads to the formula:

$$\begin{aligned} \text{Plim } \hat{\alpha} &= \alpha + \frac{\text{Cov}(\overline{Treatment}, v)}{\text{var}(\overline{Treatment})} \\ &= \alpha + \frac{\text{var}(Treatment)}{\text{var}(\overline{Treatment})} [E(v | Treatment=1) - E(v | Treatment=0)]. \end{aligned} \quad (6)$$

Where,  $\frac{\text{var}(Treatment)}{\text{var}(\overline{Treatment})} [E(v | Treatment=1) - E(v | Treatment=0)]$  measures the selection bias, which is caused by both observed and unobserved variables.

To apply this technique, we use the full sample with 336 participants to do the corresponding data analysis. Therefore, we apply Altonji's technique to estimate the bias of  $\alpha$  based on the regular regression model. The results will be presented in table 3 below.

**Table 3: Marginal Effects after implementing Altonji's Bounding Technique**

	(1)	(2)
Independent Variables	Marginal Effect from Logistic Regression	Marginal Effect after implementing Altonji's Bounding Technique
Body dissatisfaction	0.0642***	0.0856 ***
Grade	0.0478***	0.0490***
Parents highest education level	0.0061	0.0059

## 4. Results

### 4.1 Results from Logistic Regression

In this section, we present regression estimates for the causal effects of the body image dissatisfaction on the possibilities of people's low self-esteem. In column (1) of table 2, we present the marginal effects of each covariates from specification (1) to describe the effects of women's body image dissatisfaction level on their degree of self-esteem. The main variable we are interested in is the dummy variable for whether the girl is dissatisfied with her body image. The point estimate is 0.5035 and its corresponding marginal effect is 0.0642, which means that for the girls who are dissatisfied with their body image, they are 6 percent more likely to have low self-esteem comparing to the girls who are satisfied with their body image. This effect is statistically significant at 0.01 significance level for a two-tail T test. From the regression results we can also find that the coefficient of the dummy variable on academic performance is also positive and statistically significant at 0.01 significance level for a two-tail T test. This result justified our expectation that those girls with better grade in school tend to be more confident (5 percent more likely to be confident) than those who have bad academic performance at school. The marginal effect for age is also positive and statistically significant at 0.05 significance level for a two-tail T test. The magnitude is 0.03, which implies that the adolescent girls tend to be more sensitive to low self-esteem than their counterparts who are not in their adolescent ages.

However, the coefficient of family's social-economic status can be negligible because it has a very small magnitude (0.006) and its marginal effect is not statistically significant either, although the sign of the coefficient is within our expectation (positive, which means people with higher social-economic status are less likely to have low self-esteem).

**Table 2: Effects of body image dissatisfaction on females' self-esteem level**

	(1)	(2)
Independent Variables	Coefficient. (Marginal Effect)	T - value
Body dissatisfaction	0.0642	11.49 ***
Grade	0.0478	4.74***
Parents highest education level	0.0061	1.3
Age	0.0300	2.14**
Note: *** 2%, ** 5%, * 10% significance level for a two-tail T test.		

#### 4.2 Results from Altonji's Bounding Technique

As we mentioned before, considering there might be selection bias to the estimates, we use Altonji's bounding technique to correct the selection bias. Once implementing Altonji's bounding technique, we find that the body dissatisfaction can make adolescent girls' self-esteem even lower (about 8 percent) than other cohorts. The women who have bad academic performance will have about 5 percent higher possibility to have low self-esteem. The adolescent girls are about 4 percent more likely to be less confident than the girls who are no at their adolescent age (Results are shown below in Column 2 of Table 3).

**Table 3: Marginal Effects after implementing Altonji's Bounding Technique**

	(1)	(2)
Independent Variables	Marginal Effect from Logistic Regression	Marginal Effect after implementing Altonji's Bounding Technique
Body dissatisfaction	0.0642***	0.0856 ***
Grade	0.0478***	0.0490***
Parents highest education level	0.0061	0.0059
Age	0.0300**	0.0411**
Note: *** 2%, ** 5%, * 10% significance level for a two-tail T test.		

#### 5. Conclusion

Self-esteem is defined as a "positive or negative attitude toward... the self" (Rosenberg, 1965, p. 30), and can be viewed as a key indicator of psychological well-being, at least among people in Western cultures (Baumeister, Campbell, Krueger, & Vohs, 2003; Oishi, Diener, Lucas, & Suh, 1999). In Western cultures, self-esteem typically differs by gender. We, as Chinese gender study researchers are taking the action to find out if this is also true in Chinese environment.

Considering a stereotype Chinese people have toward sex disparity, while not openly stated anymore, “boys are better than girls” has deeply ingrained itself into Chinese culture, and this sex disparity can be seen in none other than the now replaced one-child policy that was in place for decades. Faced with the decision either to have only one child or to pay a hefty fine that many cannot afford, many families chose the easier option to only have one child. The idea that males are better than females comes into play when considering the sex of their only child. Families wanted to have males because they were supposed to have better job prospects, better marriage opportunities, and better societal prestige; after all, a strong boy is a symbol that parents can show off to their friends to raise their own statuses. We believe that females, especially for the adolescent females are more likely to feel less confident comparing to their cohorts. To examine whether or not there is any causal relationship between body image dissatisfaction and low self-esteem, we collect 336 female observations and conduct an empirical research regarding this topic.

Our regression results show that adolescent girls are most likely to be negatively affected by their body image dissatisfaction (about 6 percent more likely) compared to other cohorts. While when we consider there might be selection bias to the estimates, we use Altonji’s bounding technique to correct the selection bias it might cause. Once implementing Altonji’s bounding technique, we find that the body dissatisfaction can make adolescent girls’ self-esteem even lower (about 8 percent lower) than other cohorts. These findings are consistent with the hypothesis that body dissatisfaction is a risk factor for depressive mood in adolescent girls. Our results support calls for early educational intervention to help adolescent girls to adopt a correct attitude towards their body images.

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## IS “SECULAR” ECONOMIC MENTALITY A POISON FOR THE FUNDAMENTALS OF “TRUE CHRISTIAN” AND ISLAMIC ECONOMIC THOUGHT?

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### Abstract

To the contrary of teachings of True Christianity and Islam (Almighty God has Absolute Power over everything), the explanation of the “secular” economics’ mentality for the existences, creation and phenomena is as if “everything forms itself, or is created by nature and conducted by it, or is formed by accident or by necessity etc.”. The Western (European) “secular” economic mentality based on material needs and nature, has supported the idea against the belief in the hereafter; then “natural human against the believer” had been important, concerning Ancient pagan life. If the social bodies are considered as “naturally enemies”, the “optimal” level of social good mostly necessitates a suffering of the poor. And if the terrible conditions of oppressed people become better, the conditions of the oppressors get worse (certainly in view of the oppressors). For the “secular” economic mentality, the nature decides that the way to the goodness passes through the way of evil; therefore the maximum welfare is considered to be achieved by the guidance of egotism, ambition and covetousness of every individual. The Invisible Hand of Adam Smith was the processing of the Natural Law; the economic harmony was the act of human not the act of God. Concisely, it can be said that the naturalistic atheistic mentality of the “secular” economics poisons the fundamentals of “True Christian” and Islamic economic thought, since it attributes partner(s) to God that is the greatest evil for “True Christianity” and Islam.

**Key Words:** Economics, Philosophy of Naturalism, Christianity, Islam.

### Introduction:

In *The Gospel*,

“For the love of money is a root of all kinds of evil.” (1Timothy 6:10, [http://biblehub.com/1\\_timothy/6-10.htm](http://biblehub.com/1_timothy/6-10.htm));

in *The Risale-i Nur* (“a true commentary on the Qur’an” (Nursî, *The Rays*, pp.312))

“As is proved in *Isharat al-I’jaz*, just as the source of mankind’s revolutions is one phrase, so another phrase is the origin of all immorality.

First Phrase: “So long as I’m full, what is it to me if others die of hunger.”

Second Phrase: “You work so that I can eat.”” (Nursî, *The Words*, pp.421).

For the “secular” economics’ mentality, the condition for survival is crushing the weak. The egoistic is strong. The condition for survival in the secular economic life is improving egotism. Since life is a conflict and rational economic man should improve his egotism in order to provide

maximum utility/profit for himself. The criterion for the success in life is material gain; *the motive for the behavior is “the love of money”*. Rational economic man is one who prefers the alternative which provides utility for himself. But the *egotism axiom of homo economicus necessitates preferring the alternative which provides utility only for himself*. Human prefers everything which he thinks it provides pleasure for him; he would do what his soul would command him to do, even it is forbidden by God; because he loves his soul to such an extent, he idolizes it. (Erkekoğlu, 2015, pp.195).

If someone attaches more importance to “anything” than “the belief in oneness of God (*there is no god but God*)”, his greed will trigger economic, social, political, ethnical discrimination. To the contrary of teachings of True Christianity and Islam (Almighty God has Absolute Power over everything), the explanation of the Conventional economics’ mentality for the existences, creation and phenomena is as if “everything forms itself, or is created by nature and conducted by it, or is formed by accident or by necessity etc.”<sup>35</sup> This mentality raises the danger of “that greed (stated above)” and makes it dominant over those who trust in it only to be deceived by its stratagems. The weak and the innocent are crushed by “the danger of love of money”. For it controls the mentalities, the society will be formed by individualized persons who cannot live as they believe and become enslaved to ‘this untruthful love’.

### **The Western (European) Secular Economic Mentality (or Naturalistic Mentality of Secular Economics)**

The human in Christianity and Islam, will be rewarded or punished for his preferences between “good” and “evil” among which there are economic alternatives in the examination arena created by God. The laws and rules for all the preferences in the examination arena are explained. In

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<sup>35</sup> From The Collection of Risale-i Nur:

(On Nature)

“O man! You should be aware that there are certain phrases which are commonly used and imply unbelief. The believers also use them, but without realizing their implications. We shall explain three of the most important of them.

The First: “Causes create this.”

The Second: “It forms itself; it comes into existence and later ceases to exist.”

The Third: “It is natural; nature necessitates and creates it.

Indeed, since beings exist and this cannot be denied, and since each being comes into existence in a wise and artistic fashion, and since each is not outside time but is being continuously renewed, then, O falsifier of the truth, you are bound to say either that the causes in the world create beings, for example, this animal; that is to say,

it comes into existence through the coming together of causes,

or that it forms itself,

or that its coming into existence is a requirement and necessary effect of nature,

or that it is created through the power of One All-Powerful and All-Glorious.

Since reason can find no way apart from these four, if the first three are definitely proved to be impossible, invalid and absurd, the way of divine unity, which is the fourth way, will necessarily and self-evidently and without doubt or suspicion, be proved true.” (Nursî, *Flashes (Revised 2009 edition)*, p. 234).

contrast to the divine religions' rules, the Conventional economics' mentality states only thisworldly reasons for the constraints of optimizing the economic preferences (that would be 'good' or 'evil').<sup>36</sup> (Madi, 2014, pp.2). Moreover, it brings on theories and practices and certain activities that are forbidden by religion ("True religion" based on the belief of Tawhid).<sup>37</sup>

The Western (European) "secular" economic mentality based on *material needs* and *nature*, has supported the idea against the belief in the hereafter; then "*natural human against the believer*" had been important, concerning Ancient pagan life (Yalçın, pp. 130.). (Madi, 2014, pp.6).

From The Risale-i Nur Collection:

"It should not be misunderstood; Europe is twofold. One follows the sciences which serve justice and right and the industries beneficial for the life of society through the inspiration it has received from true Christianity; this first Europe I am not addressing. I am addressing the second corrupt Europe which, due to the darkness of the philosophy of Naturalism supposes the evils of civilization to be its virtues, and has driven mankind to vice and misguidance." (Nursî, *The Flashes Collection*, pp. 160).

The concept of *Natural Order* in Economics was firstly developed by the Physiocrats claims that if the government does not interfere the economic life, *everything performs itself* in a harmony and order. *The goal of economics is to analyze those Natural Order Laws*. Amongst the regimes it is the most useful one, the natural order. Adam Smith claimed that the economic harmonies are not the act of God but the act of human. He claimed that The Invisible Hand organizes the economic life. *For Smith, the acts of individuals whom take into account their self-interests, cause the social order to be beneficial.* (*Genel Ekonomi Ansiklopedisi*, Cilt 1, pp. 223). He believed that if the natural laws are respected, the society performs itself optimally; thus, national wealth will rise and the optimal distribution will be reached among the individuals. For Smith individual incentives are mostly active in economic life; the ethos in which every individual could get the maximum interest is the Natural social order. (Erkekoğlu 2015, pp.94; Kazgan, pp. 58-60).

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<sup>36</sup> From The Risale-i Nur Collection: "Once, at a time of general mobilization, two soldiers found themselves together in a regiment. One was well-trained and conscientious, the other, a raw recruit and self-centred. The conscientious soldier concentrated on training and war, and did not give a thought to rations and provisions, for he knew that it was the state's duty to feed and equip him, treat him if he was ill, and even to put the food in his mouth if the need arose. He knew that his essential duty was to train and fight. But he would also attend to some of the rations and equipment as part of his work. He would boil up the saucepans, wash up the mess-tins, and bring them. If it was then asked him: "What are you doing?, he would reply: "I am doing fatigue duty for the state." He would not say: "I am working for my living."

The raw recruit, however, was fond of his stomach and paid no attention to training and the war. "That is the state's business. What is it to me?, he would say. He thought constantly of his livelihood, and pursuing it would leave the regiment and go to the market to do shopping. ...."

O my lazy soul! That turbulent place of war is this stormy worldly life, and the army divided into regiments, human society. The regiment in the comparison is the community of Islam in this century. One of the two soldiers is a devout Muslim who knows the obligations of his religion and performs them, and struggles with Satan and his soul in order to give up serious misdoings and not to commit sins. While the other is a degenerate wrongdoer who is so immersed in the struggle for livelihood that he casts aspersions on the True Provider, abandons his religious obligations, and commits any sins that come his way as he makes his living." (Nursî, *The Words*, p. 34-35 ).

<sup>37</sup> Gambling, for instance is explained by "utility".

*The Invisible Hand* of Adam Smith was the processing of the *Natural Law, not a conscious design of someone*. It was a clear and simple free natural system. In the theories of Smith the theme is that the individuals behave egoistically and absolutely for their own benefit. All economic activities are determined by egoistic and greedy motives. (Hunt and Lautzenheiser, pp.82, 102, 103).

For Smith, the economic harmony is the act of human not the act of God. Moreover, as the Invisible Hand is the self-interest, the economic harmony and the maximum welfare are achieved *by the guidance of egotism of every individual*. For the economic policies based on individualism, *egotism, ambition and covetousness* tend to give a part to studiousness and economic boom. The ultimate criteria of social values are the individual desires which are related to the purchasing power in the market. (*Genel Ekonomi Ansiklopedisi (Cilt 1)*, p.223; (Hunt and Lautzenheiser, pp.68,69).

Since the social bodies are considered “naturally enemies”, *the nature decides that the way to the goodness passes through the way of evil; that is achieving the highest level of social good, it mostly necessitates a suffering; and that the people who must suffer are inevitably the poor*. Therefore, if the terrible conditions of oppressed people become better, the conditions of the oppressors get worse (certainly in view of the oppressors). Hunt and Lautzenheiser, pp.226, 558, 559).

Christianity considers *humility and reverence* among the highest virtues; those virtues are in the core of the Christian piety. The opposite of this, the *arrogance*, i.e. considering oneself equal to God is the greatest evil<sup>38</sup>. (Gökberk, pp. 198).

From The Risale-i Nur Collection:

“O Europe corrupted with vice and misguidance and drawn far from the religion of Jesus! You have bestowed this hellish state on the human spirit with your blind genius which, like the Dajjal<sup>39</sup>, has only a single eye. You afterwards understood that this incurable disease casts man down from the highest of the high to the lowest of the low, and reduces him to the basest level of animality. The only remedy you have found for it are the fantasies of entertainment and amusement and anodyne diversions which temporarily numb the senses.” (Nursî, *The Flashes Collection*, pp. 161).

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<sup>38</sup> “Wherefore he saith, God resisteth the proud, but giveth grace unto the humble.” (New Testament, James 4:6; <https://incil.info/arama/Yakup+4>).

“For the proud, that is the loftiest in heart, shall plunged into the lowest centre, passing through all the centres above it, and suffering in them all the pains that are therein. And as here he seeketh to be higher than God, in wishing to do after his own manner, contrary to that which God commandeth, and not wishing to recognize anyone above him: even so there shall he be put under the feet of Satan and his devils, who shall trample him down as the grapes are trampled when wine is made, and he shall be ever derided and scorned of devils.” (135: Seven Centers of Hell; <http://www.barnabas.net/index.php/chapters/314-135-seven-centers-of-hell>).

<sup>39</sup> “The *Dajjal*: the Antichrist related to come at the end of time.” (From the footnote of the same source as indicated above, p. 161)

**With the Philosophy of Renaissance, European culture has become increasingly independent and *illuminated only by human reason*:<sup>40</sup>**

Renaissance is primarily considered as “a new emotion of life, a rise of a new worldview”. On the base of this new worldview, with the close aid of the Ancient Age at the beginning, a new *human* consideration, a new *religion* vision and new thoughts on the *state* and *law* had been developed distinctly from those of the Middle Age. The *science of nature* is stated as “the greatest success of Renaissance”. ‘The *nature* of Renaissance’ is *eternal*; its eternity is said to approach the nature to God; *even nature is said to be identical to God*. (Gökberk, 1974, pp.222, 225).

As a result of the studies of Renaissance “existing modern science” have been formed. In order to comprehend the Naturalistic Philosophy of Renaissance, (Erkekoğlu, 2015, pp.90; Gökberk, pp.222); one should analyze what is said for the nature and its relation with the secular economic mentality.

In the Philosophy of Renaissance, the nature is “*directly* the target, the limitless, eternal world”. Thereby, the nature gets closer to Eternal God; moreover, “*it becomes identical with God*”.(Erkekoğlu, 2015, pp.91 ; Gökberk pp.225).

The main tendency of the philosophy during Renaissance is to cease every type of dependence and to *rely only on oneself*. Therefore, philosophy of Renaissance has tried to be separated from all historical authorities and to *reshape the truth* provided by only *reason* and *experience*. The Ancient thought reappeared in the Renaissance. There existed a *unity* of thought in the Middle Age; the way of this thought was one, its aim was unique. On the contrary, in the Renaissance, this unity failed; the way for the truth is not one; Renaissance philosophy, like Ancient Age philosophy, attempted diverse ways for the issues as universe and human. Various movements of Renaissance unite for only to be opposed to the Scholastic philosophy. The Scholastic thought was dominant throughout centuries and could not fail with a new thought. The fail begun before the Renaissance. The Scholastic philosophy attempted to unite the Christian bases with the philosophy. The claim was that the thought of religion and the thought of philosophy may *unite*; they are not contrary to each other. (Gökberk, 1974, p. 190-192).

From The Risale-i Nur: “*Consider this*: in the world of humanity, from the time of Adam up to now, two great currents, two lines of thought, have always been and will so continue. Like two mighty trees, they have spread out their branches in all directions and in every class of humanity. One of them is the line of prophethood and religion, the other the line of philosophy in its various forms. Whenever those two lines have been in agreement and united, that is to say, if the line of philosophy, having joined the line of religion, has been obedient and of service to it, the world of humanity has experienced a brilliant happiness and social life. Whereas, when they have become separated, goodness and light have been drawn to the side of the line of prophethood and religion, and evil and misguidance to the side of the line of philosophy.” (Nursî, 2013, *The Words*, p.561.).

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<sup>40</sup> This title is formed from a statement given by Gökberk, 1974, p. 184.

Renaissance means “*living in luxury, enjoyments and leading a life of pleasure*”; interpreted strictly, “the studies of the Ancient age are regenerated”. As the main tendency of the philosophy is *relying only on oneself, discover himself*, the philosophy of Renaissance endeavored with “*the realities provided by only experience and reason*”. The main tendency is “to desire to become independent of the authorities”. Human “is not the big organ of a big organism” but “a *micro-organism, an individual*”. The nations are not the parts of the Universal Christian community anymore, but the *individualitas*. (Erkekoğlu, 2015, pp.85; Gökberk, pp.187-191,193; Zeytinoglu, pp.23).

However, in The Gospel :

“Every kingdom divided against itself is brought to desolation; and a house divided against a house falleth.” (Luke 11:17-18, <https://incil.info/kitap/luk/11>).

Renaissance had substantially affected the economic life with a more *materialistic worldview*. With the Renaissance, the movement of Humanism which by emphasizing a mentality based on material needs and *nature*, supported an idea against the belief in the hereafter; then “*natural human against the Christian*” had been important, concerning Ancient pagan lives of Romans and Greeks. (Yalçın, 1976, p.130; Madi, 2014, p.6; Erkekoğlu, 2015, p. 86).

Humanistics of the Renaissance, like Niccolo Machiavelli, had been “pagans of the Ancient Age rather than Christians”. According to Machiavelli, who was an admirer of Ancient paganism, human is a power of the nature and s/he is “not in the morale of the *humility, satiety* of the Christianity”. He believed that Christianity had not appreciated the value of thisworld; whereas the Ancient religions supported thislife for the mankind as the highest value. As the *Reformation* had been the rebirth of the Ancient philosophy’s traditions, it was said by some cultural historians that the Renaissance occurred from that *new movement of religion*. (Gökberk, 1974, pp.198, 206; Erkekoğlu, 2015, pp.87,88).

*Niccolo Machiavelli* whose interest was politics aimed to materialize the state and make the politics independent of morals. (Erkekoğlu, 2015, pp.87 ; Machiavelli, pp. 2,4). Gökberk stated as follows: “*Machiavelli like all the humanistics living in the same age, is an antiquity pagan rather than a Christian*. According to him Christianity underestimated thisworldly life’s value but the Ancient religions connected the human to life by advising thisworldly life as the greatest value”. (Erkekoğlu, 2015, pp.87-88 ; Gökberk pp. 198, 216). Machiavelli considered the human nature as evil and egoistic. He claimed that the human being takes mostly the material things seriously. He also claimed that “*the end justifies the means*” (Machiavelli, pp.3). For him a leader cannot succeed in a society consisted of egoistic individuals; the politician, the national leader must be egoistic; “a fair, generous and benevolent statesman” is not suited for the state affairs.(Erkekoğlu, 2015, pp.87-88; [https://tr.wikipedia.org/wiki/Niccol%C3%B2\\_Machiavelli](https://tr.wikipedia.org/wiki/Niccol%C3%B2_Machiavelli)).

*Humanism* is a movement which concentrates on the “*human issue based on Ancient Age’s model*”. It is aimed to form “a *culture independent of the religion*” with the sense of a “new life”. In the Renaissance- *an individualism age*- the nation became as “a community within the humans are aware of their specific ego. *Francesco Petrarca*, led the humanism which seeked for *the natural real human; since he took the Stoic model of Rome, Renaissance met the Stoicism*. For

him, the life is not a transition to hereafter. Human lives “a universal *acedia* (pain)” while struggling within a wild survival. (Erkekoğlu, 2015, pp.86-87; Gökberk, pp.194-197).

By the Renaissance, “a *natural religion* based on the human nature independent of the religions or a *movement of the religion of reason*” being originated the Ancient Stoic Philosophy have been adopted. For this movement “religion is a product of reason not the product of revelation”. As in Stoicism, *nature* and *reason* have the same meaning; in the nature “*universal reason*” is *sovereign*. (Erkekoğlu, 2015, pp. 90; Gökberk pp.212-213).

### **Law of Nature in “Secular Economics” and the Ancient Age Philosophy:**

Ancient Romans had been the students of the Ancient Greek philosophers (however, they were the most voluminous for the Stoic thought). The well-known movements of Hellenistic philosophy were Epicurism, Stoicism and Skepticism; and especially the upper class of the Roman Empire who was ‘*fond of pleasure*’, internalized Epicurean thought. Marcus Aurelius, Cicero, Epiktetos, Seneca were some of the most famous Roman philosophers. Cicero attempted to derive a *natural law* effective for all human, from the common reason of mankind. For Seneca, *one should not connect the causes one by one to God*; God is the *law of nature* which covers all and everything “*comes into existence and later ceases to exist*” necessarily in an order. For Epiktetos, it is the reason which brings human to the truth; human can be virtuous himself. For him, the highest aim in life -virtue- is *living with respect to nature, dominance of the reason* in oneself. From Marcus Aurelius’ words: “Live with respect to the nature; later, leave the life without sadness- like a mellowed fruit. The fruit, if it is mellowed it falls to the ground, by being *grateful to the land and tree which created it.*” (Gökberk, 1974, p. 126, 127, 129, 131,132).

By the end of the Ancient Age, in the philosophy, the *nature* and the *books* (religious books and the books of philosophy) are treated exactly alike; and the nature became the book of God; the books and the mythos were made ‘the *documents* of the hidden truth’. Previously, this method was used by the Sophists and Stoicisim; but it was Philon who developed it. Later, Christian philosophers declared that with Jesus (Upon whom be peace) Divine Logos had appeared in human form, by using the method of Philon. The belief which made Philon use this method was that “In the Holy Book, the meaning of ‘the words’ and ‘the soul’ should be separated. As the majority of people cannot understand the Divine, God willing to inform His commands, has made the revelation appear in human form-anthromorph. A wise person should strive to understand the ‘hidden meaning’ behind that appearance. This can be interpreted within the *concepts of the philosophy*. This view gave direction to the subsequent theology after Philon for “regarding the religious documents as a system of *scientific* teachings”. (Gökberk, 1974, p.137).

In the teaching of Plotinos- the founder of Neo-Platonism, there were impacts of Stoicisim and Aristoteles. After him, *Neo-Platonism had been “paganism’s (polytheism’s) ethos of warfare against Christianity”*. Ammonius Sakkas, previously a Christian, later was out of religion and devoted himself to philosophy, was the teacher who impressed Plotinos. For Plotinos, *immortal* human soul is covered by various bodies throughout its transmigrations; the *destiny* of the soul is dependent on its behavior in its preceding life. The latest extent to which a soul may reach is its ‘*mystical joining* with One (with Deity)’. Syrian Iamblikhos, a student of Porphyrios who mostly developed Neoplatonism after the death of Plotinos, wished to make Plotinos’ philosophy



foundation for *polytheism*. Among Iamblikhos' students, the Emperor Julianus Apostata was a Christian, later reverted to polytheism, had fought to preclude Roman religion from Christian influence, by referring to Neoplatonism. Roman state wanted its citizens to reside in its religion – the emperor's cult-and quitting the official religion was considered a *political crime*. The believers in One God in Christianity had been subjected to torture, oppression and expulsion during 2.5 centuries. (Gökberk, 1974, p.138,139,143,144, 148).

God, according to Christianity, is the Creator of the earth Who created it from nothing with His Will. There is a difference between the Creator and the creature. On the other hand, in The Ancient Age, there is no certain contrast between the creator and the creature; since for the Ancient Age, God is considered as the architect of this universe and has found the material ready to form; because the material is pre-eternal like God, it is not created, like God. According to the typical view of Ancient Age-Neoplatonism-God is the creature itself; the existences have been derived from God; therefore they are *identical* with Him; they are from the same *one matter*. Human can find God *in himself*. Whereas in Christianity, the Creator and the creatures are not from the same matter. Human is grateful to God for his existence; thus the unique aim for human is fulfill the commandments willed by God. God is the center of every existence; everything exists because God wills it. (Gökberk, 1974, p.154-155, 207 ).

While some analysts have claimed that Renaissance occurred as a result of “movement of religion”; some have claimed that *Reforme* or *Reformation*-one of the most important phenomena of Renaissance”-as a pursuit of new religion, is “a revival, a renaissance of the Ancient philosophy's traditions”. *It is claimed that Reformation had comprised to revert to the Early Christianity by overcoming the Medieval Church; also Reformation originated the Ancient thought.* (Erkekoğlu, 2015, pp.89; Gökberk pp.206).

It is crucial to state that this mentality cannot recognize, comprehend and realize that this paradoxical claim- a great contradiction” : *How can Christianity revert to its essence by corresponding to the Ancient pagan thought???*

### **The Truth About the Religion of Jesus (Peace be upon him):**

From The Risale-i Nur Collection:

“For example:

*He begets not, nor is He begotten\* And there is none like unto Him.*<sup>41</sup>

The share of understanding of this of the ordinary people, which forms the most numerous class: “Almighty God is above having mother and father, relatives or wife.” While the share of a middle class: “It is to deny the divinity of Jesus (Peace be upon him), and the angels, and anything which has been born.” For although denying something impossible is apparently purposeless, according to the rules of rhetoric, a necessary statement is intended, which gives it purpose. Thus, the purpose of denying son and begetter, which are particular to corporality, it is to deny the divinity of those who have offspring and parents and equals; and it is to show that they are not worthy of being worshipped. It is because of this that *Sura al-Ikhlās* is beneficial for everyone all the time. The share of a more advanced class: “Almighty God is above all relations which suggest giving birth and being born. He is exempt from having any partners, helpers or

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<sup>41</sup> Qur'an, Sura al-Ikhlās, Ayah 3-4.

fellows. His relations with all beings are those of Creator. He creates through His pre-eternal will with the command of “*Be!*”, *and it is*. He is far beyond having any relation which is contrary to perfection, or is compelling, necessitating, or involuntary.” And the share of understanding of a higher class still: “Almighty God is pre-eternal and post-eternal, He is the First and the Last. Neither in His essence, nor in His attributes, nor in His actions, has He in any way any equal, peer, like, or match, or anything similar, resembling, or analogous to Him. Only, in His acts, there may be comparisons expressing similarity:  
*And God’s is the highest similitude.*<sup>42</sup>” (Nursî, *The Words*, pp.425).

From The Risale-i Nur Collection:

“Because in the religion of Jesus (Upon whom be peace), only the fundamentals of religion were taken from him. Most of the injunctions relating to social life and the secondary matters of the law were formulated by the disciples and other spiritual leaders. The greater part were taken from former holy scriptures. Since Jesus (Upon whom be peace) was not a worldly ruler and sovereign, and since he was not the source of general social laws, the fundamentals of his religion were as though clothed with the garment of common laws and civil rules taken from outside, having been given a different form and called the Christian law. If this form is changed and the garment transformed, the fundamental religion of Jesus (Upon whom be peace) may persist. It does not infer denying or giving the lie to Jesus himself (Upon whom be peace). (Nursî, *The Letters (New Edition, 2010; reprinted with corrections, 2014)*, p. 498).

“True Gospel of Jesus, called Christ, a new prophet sent by God to the world: according to the description of Barnabas his apostle. Barnabas, apostle of Jesus the Nazarene, called Christ, to all them that dwell upon the earth desireth peace and consolation.

Dearly beloved the great and wonderful God hath during these past days visited us by his prophet Jesus Christ in great mercy of teaching and miracles, by reason whereof many, being deceived of Satan, under presence of piety, are preaching most impious doctrine, calling Jesus son of God, repudiating the circumcision ordained of God for ever, and permitting every unclean meat: among whom also Paul hath been deceived, whereof I speak not without grief; for which cause I am writing that truth which I have seen and heard, in the intercourse that I have had with Jesus, in order that ye may be saved, and not be deceived of Satan and perish in the judgment of God. Therefore beware of every one that preacheth unto you new doctrine contrary to that which I write, that ye may be saved eternally.

The great God be with you and guard you from Satan and and from every evil. Amen.” (1: True Gospel of Jesus, <http://www.barnabas.net/index.php/chapters/386-1-true-gospel-of-jesus>).

In the Canonical Gospels, Saint Barnabas is not stated as Apostle. As it appears from “Acts”, Paul met Epicurean and Stoic philosophers in Greece. Barnabas, always following Tawhid, believed in Jesus Christ (PUH) a Prophet of Islam, and had written his Gospel before “the Canonical Bibles” were written. (*Barnabas İncili*, pp.39, 49, 51,)

“In these last years a virgin called Mary, of the lineage of David, of the tribe of Judah, was visited by the angel Gabriel from God. This virgin, living in all holiness without any offense, being blameless, and abiding in prayer with fastings, being one day alone, there entered into her

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<sup>42</sup> Qur’an, 16:60.

chamber the angel Gabriel, and he saluted her, saying: 'God be with thee, O Mary'. The virgin was affrighted at the appearance of the angel; but the angel comforted her, saying: 'Fear not, Mary, for thou hast found favour with God, who hath chosen thee to be mother of a prophet, whom he will send to the people of Israel in order that they may walk in his laws with truth of heart.' The virgin answered: 'Now how shall I bring forth sons, seeing I know not a man?' The angel answered: 'O Mary, God who made man without a man is able to generate in thee man without a man, because with him nothing is impossible.'" ("Chapter 1. The angel Gabriel visits Virgin Mary concerning the birth of Jesus.", <http://www.barnabas.net/index.php/chapters/386-1-true-gospel-of-jesus>).

From The Risale-i Nur Collection:

"Those who do not accept the Single One of Unity (*Vâhid-i Ehad*), therefore, must either accept innumerable gods, or else like the foolish Sophists, deny both their own existence and that of the universe." (Nursî, *Letters (New Edition, 2010; reprinted with corrections, 2014)*, p. 269).

### **A (Economic) Danger for True Believers:**

"True Christianity" and Islam teach the Absolute Sovereignty of God. "The individual is a part of the community" where everyone strains at the benefit of all. Unity and union principles are emphasized; on the other hand, secular economics' mentality claims that "if everyone seeks after his own interest, then the social interest, *itself*, will reach the maximum level".

For the «secular» economics' mentality, based upon the fundamentals of the European Enlightenment, self-operating markets sustain the idea that '*Human Nature*'. The basic principle is egoism in economic relations. Within a 'natural game', each individual improves his/her egotism in economic decisions. It is necessary to discuss and conclude that "ignorance of others is an unethical behaviour for economic agents performing their activities only in pursuance of their self-interests.» That conduct-based on the *naturalistic* (worldly minded) and *materialistic* philosophy- is contrary to the "True Christian and Islamic economic doctrine". "Secular" economic activities are performed in an *interest-based regime* in which the economic man/homo economicus is considered to improve his *egotism and thus greed, and utilitarianism*. That naturalistic and materialistic mentality depends on the idea that "*force (power) brings right*". (Erkekoğlu, 2015, pp. iv-v; Erkekoğlu and Madi, 2016, pp. abstract,9,[http://papers.iafor.org/wpcontent/uploads/papers/ecerp2016/ECERP2016\\_32334.pdf](http://papers.iafor.org/wpcontent/uploads/papers/ecerp2016/ECERP2016_32334.pdf) ).

The "secular economic man" or homo economicus was an assumption based on the Natural Philosophy. Homo economicus is a sordid, cruel, disruptive, truculent, hedonistic, individualistic economic man. Indeed, the assumption includes six axioms in which three of those are that s/he is rational, nonsatiated and egoistic (Erkekoğlu, 2015, pp.99; Madi, 2014, pp,109; Erkekoğlu and Madi, 2016, pp. 9,11).

The hedonistic and individualistic principals of the human assumption of the "secular economics" are based upon the mentalities of the Ancient Rome and Ancient Greece, influenced by Stoicism and Epicurism philosophies: Human being should live with respect to the *nature*, he must not be loyal to the state or to God. He must live freedom strictly and "have minimum pain

and maximum pleasure” (maximum profit/utility and minimum cost in Economics). (Erkekoğlu and Madi, 2016, pp. 3,4).

By Professor S.S. Alexander, the ethical hedonism of the welfare economics was named as “pig principle”: if you like something more is better. More pleasure is ethically better than the less, for Benthamic version. Atomistic individual is the unique judge who evaluates the pleasure, the utility of an object. Since the welfare is assumed to be only between the individual and the object to be consumed. *The ultimate criteria of social values are the individual desires which are related to the purchasing power in the market.* A (Hunt and Lautzenheiser, pp.557).

Nonsatiation axiom («covetousness») of the homo economicus is that he would always prefer more over less even if the adequate amount is provided for him in a specific basket. (Özkazanç, Berberoğlu and others, pp.21-22; Madi, 2014, pp. 112)

For Bentham, the founder of the Utilitarian School, human being is an individualist who maximizes his/her pleasures. All work and effort are afflictive. Nassau Senior, like Say and Bentham supported modern classical economics. He believed that it was surely obligatory to make the labor live within a continuous and excessive fear of deprivation. He thought that, like Malthus, to achieve the highest level of social good, it mostly necessitates a suffering; and that the people who must suffer are inevitably the poor. He said: *The Nature decided that the way to the goodness passes through the way of evil.* (Hunt and Lautzenheiser, pp.202,203, 214,226).

One of the advocates of the individualistic morality which is the principle of the classical liberalism was Sir Dudley North. He believed that all human act with self-interest motive and that the social welfare would achieve the maximum level if the individuals were free. North claimed the following; when the merchants and the capitalists argue with a special law for production and trade, “they generally aggrandize their own indirect interests to be the common criterion for the good and the evil. Many people *ignore how much working people suffer for a small gain*, and all of those people strive for forcing the other (working people) to help for their earnings as if they work for society, while working for themselves.” Bernard Mandeville claimed that *egotism, ambition and covetousness tend to give a part to studiousness and economic boom.* What turpitude is according to medieval moralists, were the driving force that induce the new capitalist system. And *those motives were no more turpitude* in the new religious, moral and economic philosophies of the capitalist era. (Hunt and Lautzenheiser, pp.68,69).

The advocates of the liberal economic doctrine were impressed by the *Enlightenment* mentality. Some of the economists of the Enlightenment were Adam Smith, David Ricardo (Philosophers of the Enlightenment). (Erkekoğlu, 2015, pp.248).

Liberal economic doctrine was affected by rationalism. In the 17<sup>th</sup> and 18<sup>th</sup> centuries, the interest on physical and social sciences was high in Great Britain and France. It was believed that with the reason or natural logic, it might be possible to obtain perfect knowledge in all social and physical sciences and to discover the laws of society and universe with human reason. (Erkekoğlu 2015, pp 123,124. Kazgan, pp. 51, 55-56).

John Locke who started the Enlightenment in England, so in Europe, emphasized the individual freedom and the role of the reason of providing guidance to life. He stated that it was necessary to get rid of the authorities and traditions, then it should be practiced in “science, religion, education, state etc, in all cultural fields”. Political liberalism in state, natural religion, rational-natural education ideas show that Locke was a typical enlightened. The center of his products and research was the *human being*. (Gökberk pp.340-341). He was interested in economics and advocated the middle class’ interest, merchants and land owners and the property rights. He was “for the equity and freedom in a political and formal sense but he was not for the social justice” .(Madi, 2014, pp.72; Tunçay, pp.255-256). He tried to explain the economic issues with the basis upon the Natural Law Philosophy; became a philosopher of Physiocracy who claimed the possibility of forming universal rules. (Erim, pp.16-18; Erkekoğlu, 2015, pp.103).

The basic principle of Pareto optimum defines an economic condition of an individual “optimal” if no change can make his condition (in a manner he defines himself) better without making another individual’s condition worse ( in a manner the other individual evaluates his own condition). That means, if the terrible conditions of oppressed people become better, the conditions of the oppressors get worse (certainly in view of the oppressors). The social bodies are “naturally enemies”. (Hunt and Lautzenheiser, pp.558,559).

If a utility for an individual affects another individual, those interactions are called “externality”. According to utilitarian economics and the maximizing economic man assumption, if there is a negative externality and it is assumed that the government has formed the property rights and a market for those; it is known that they will be better off while bargaining in the new market. Thus, it is possible to cause negative externalities intentionally. *The greater the cost that an individual creates on its neighbor, the bigger the reward he gets in the bargaining process.* (Hunt and Lautzenheiser, pp.570,571).

However, for the religious economic thought;

In The Torah: “And God spake all these words, saying, I am the LORD thy God, which have brought thee out of the land of Egypt, out of the house of bondage. Thou shalt have no other gods before me. Thou shalt not make unto thee any graven image, or any likeness of any thing that is in heaven above, or that is in the earth beneath, or that is in the water under the earth. Thou shalt not bow down thyself to them, nor serve them.”; (Exodus 20: 2-5) «Thou shalt not steal. Thou shalt not bear false witness against thy neighbour. Thou shalt not covet thy neighbour's house, thou shalt not covet thy neighbour's wife, nor his manservant, nor his maidservant, nor his ox, nor his ass, nor any thing that is thy neighbour's. (Exodus 20:15-17, <https://incil.info/kitap/Misirdan+Cikis/20>).

In the Zabur: “Like a maniac shooting flaming arrows of death is one who deceives their neighbor and says,“I was only joking!” (Proverbs 26: 18-19). (<https://www.biblegateway.com/passage/?search=Proverbs+26&version=NIV>)

In Jeremiah 22:13; “Woe unto him that buildeth his house by unrighteousness, and his chambers by wrong; that useth his neighbour's service without wages, and giveth him not for his work;” (<https://incil.info/kitap/jer/22> )

In the Gospel, “Mark 12: “The Greatest Commandment” One of the teachers of the law came and heard them debating. Noticing that Jesus had given them a good answer, he asked him, “Of all the commandments, which is the most important?” “The most important one,” answered Jesus, “is this: ‘Hear, O Israel: The Lord our God, the Lord is one. Love the Lord your God with all your heart and with all your soul and with all your mind and with all your strength.’<sup>1</sup> The second is this: ‘Love your neighbor as yourself.’<sup>1</sup> There is no commandment greater than these.” “Well said, teacher,” the man replied. “You are right in saying that God is one and there is no other but him. To love him with all your heart, with all your understanding and with all your strength, and to love your neighbor as yourself is more important than all burnt offerings and sacrifices.” When Jesus saw that he had answered wisely, he said to him, “You are not far from the kingdom of God.” And from then on no one dared ask him any more questions.” (<https://www.biblegateway.com/passage/?search=Mark+12&version=NIV>)

In the Gospel: ““Love your neighbor as yourself.” Love does no harm to a neighbor. Therefore love is the fulfillment of the law.” (Romans 13:7-10). (<https://www.biblegateway.com/passage/?search=Romans+13&version=NIV>).

In the Gospel: Roman 15:1-2, “We then that are strong ought to bear the infirmities of the weak, and not to please ourselves. Let every one of us please his neighbour for his good to edification.” (<https://incil.info/arama/Romalilar+15>)

In the Gospel: “You have heard that it was said, ‘Love your neighbor and hate your enemy.’ But I tell you, love your enemies and pray for those who persecute you,” (Matthew 5: 43-44, <http://biblehub.com/matthew/5-44.htm> ).

From The Risale-i Nur Collection:

“*«In the Name of God, the Merciful, the Compassionate.*

*Verily the believers are brethren; so reconcile then your brothers.(49:10) \* Repel evil with what is better than it; then the one between whom and yourself enmity prevails will become like your friend and intimate.(41:34) \* Those who suppress their anger and forgive people – verily God loves those who do good.(3:134)*

Dispute and discord among the believers, and partisanship, obstinacy and envy, leading to rancour and enmity among them, are repugnant and vile, are harmful and sinful, by the combined testimony of wisdom and the supreme humanity that is Islam, for personal, social, and spiritual life. They are in short, poison for the life of man. We will set forth six of the extremely numerous aspects of this truth.

*First Aspect*

They are sinful in the view of truth.

O unjust man nurturing rancour and enmity against a believer! Let us suppose that you were on a ship, or in a house, with nine innocent people and one criminal.

If someone were to try to make the ship sink, or to set the house on fire, because of that criminal, you know how great a sinner he would be. You would cry out to the heavens against his sinfulness. Even if there were one innocent man and nine criminals aboard the ship, it would be against all rules of justice to sink it.

So too, if there are in the person of a believer, who may be compared to a dominical dwelling, a divine ship, not nine, but as many as twenty innocent attributes such as belief, Islam, and neighbourliness; and if you then nurture rancour and enmity against him on account of one criminal attribute that harms and displeases you, attempting or desiring the sinking of his being, the burning of his house, then you too will be a criminal guilty of a great atrocity.»”

[http://www.nur.gen.tr/en.html#leftmenu=Risale&maincontent=Risale&islem=read&KitapId=499&BolumId=8785&KitapAd=Letters+\(+revised+\)&Page=307](http://www.nur.gen.tr/en.html#leftmenu=Risale&maincontent=Risale&islem=read&KitapId=499&BolumId=8785&KitapAd=Letters+(+revised+)&Page=307)

From The Gospel:

“And he spake this parable unto them, saying, What man of you, having an hundred sheep, if he lose one of them, doth not leave the ninety and nine in the wilderness, and go after that which is lost, until he find it? And when he hath found it, he layeth it on his shoulders, rejoicing. And when he cometh home, he calleth together his friends and neighbours, saying unto them, Rejoice with me; for I have found my sheep which was lost.” (Luke 15:3-6, <https://incil.info/kitap/luk/15>).

From The Risale-i Nur Collection:

“Pure Justice: “the rights of an innocent man cannot be cancelled for the sake of all the people. An individual may not be sacrificed for the good of all. In the view of Almighty God’s compassion, right is right, there is no difference between great and small. The small may not be annulled for the great. Without his consent, the life and rights of an individual may not be sacrificed for the good of the community. If he consents to sacrifice them in the name of patriotism, that is a different matter.”

As for relative justice, a particular is sacrificed for the good of the universal; the rights of an individual are disregarded in the face of the community. The attempt is made to apply a sort of relative justice as the lesser of two evils. But if it is possible to apply pure justice, to apply relative justice is wrong and may not be undertaken.” (Nursî, *The Letters*, 2010, pp. 71).

On the contrary, the secular economic mentality may cancel the rights of the innocent men for the sake of one man. The small is annulled for the great; the strong crush the weak. The most egoistic is the most strong. Justice lines up with power. The assumption of Homo economicus of the «naturalistic atheistic mentality» of the secular economics is a great danger for the «True Christian and Muslim». (Erkekoğlu and Madi, 2016, pp. 8).

## Conclusion:

The material is not the starting point. Just like initially a beast cannot become an angel later, the path to the goodness does not pass through the way of the evil; indeed, one cannot justify all the means to the end. Justice cannot be achieved from the cruelty of the oppressor. The truth cannot be learned from the illusive. Thus, the naturalistic atheist mentality of “secular” economic thought may be a monster that is a great beast, a great snake threatening the fundamentals of “True Christian” and Muslim belief.



“For if respect and compassion quit the human heart, those with such hearts become exceedingly cruel beasts and can no longer be governed through politics.” (Nursî, *The Rays*, pp.109).

Concisely, it can be said that the naturalistic atheistic mentality of the “secular” economics poisons the fundamentals of “True Christian” and Islamic economic thought, since it attributes partner(s) to God that is *the greatest evil* for “True Christianity” and Islam.

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## PSYCHOLOGICAL CAPITAL AND WELL-BEING AMONG MALAYSIAN TEACHER

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### ABSTRACT

This study through educational narratives aims to explore the well being of teachers in Malaysia school as well as the use of psychological capital (PsyCap) in this profession. It has been well documented in previous research that teaching as a high-stress profession that affect teacher's well being and performance at work and to a greater consequence result to teacher's turnover. While some teachers face those circumstances, there are those who are able to successfully overcome those challenges and retain positive commitment to the work. This could be very well explained by the model of Psychological Capital that underlies by four core constructs which is optimism; hope; self-efficacy; and resilience. Previous study shows that these constructs have positive relationship with teacher's well being (Stajkovic & Luthans, 1998). Focus has been given on this issue due to the fact that through the introduction of Malaysia Education Blueprint 2013-2025, Education Ministry of Malaysia is serious in assuring teaching to become the career of choice. Hence, teacher's welfare should be taken in consideration. The studies on psychological capital are mostly done in quantitative method and only limited number of studies was done qualitatively. This study attempts to contribute to the literature by adopting qualitative research paradigm. This study may be used to increase the understanding on which components of PsyCap teachers have and to what extent they give importance to the construct.

**Keywords:** Psychological Capital; teacher; well-being; stress; educational narratives.

### Introduction

Let me say, as a prelude, that the beliefs that I hold about learning and also knowledge are stemmed from scholar Imam Al-Ghazali's teaching. With Islam as my religious background, it is very much clear the reason I am standing at this point and how it has deeply affected my view about learning and knowledge. Though his teaching is not my main focus in this paper, as my beliefs is deeply rooted from his perspective, I will briefly introduce him and describe this great scholar's teaching and by the end of the review for this paper, readers will come to understand why he is worth mentioning.

To start with, in the Islamic theory of knowledge, 'ilm is the term in Arabic use for knowledge. Knowledge in the western world means facts, information, and skills acquired through experience or education; the theoretical or practical understanding of a subject. While 'ilm (knowledge) as according to Imam Al- Ghazali is the term encompass education, theory, and action. Not only that, he added, knowledge can bring us closer to God as well as enhance worldly respect and position (Faris, 1962 & Al-Abrasy, 1973). Knowledge is not relative but has an entity in itself. It can raise the status of the individual, create self-respect and take him to the highest position. He emphasised that knowledge is information gathered either through five external senses; sight, hearing, taste, smell and touch or the five internal senses; imagination, recollection, reflection, memory and common sense. In addition, knowledge is acquired by learning and deduction, as for example, two plus two equal to four or through inference such as reflection (Scallie, 2010). Acquired knowledge deals either with the present world, such as the arts and sciences or the next world such as knowledge of the heart, god and his attributes. The power of the intellect cannot master the knowledge of both worlds, as it can cause tension. Lastly, according to him knowledge can also be flung into the heart without acquisition or proof and this is called General Inspiration. This is the way Prophets and Saints had the divine inspiration revealed to them, not by learning and studying but by cutting off ties with the present world, emptying the heart and advancing wholeheartedly toward god (Scallie, 2010). As a whole, Imam Ghazali's aim of knowledge is that the knowledge gained as a result of education should be useful for both individual and the society. Education

serves as a medium for character building so that it could differentiate between good and evils and thus avoid from following the evil path (Al-Abrasy, 1973).

Let me also say, scholars, psychologists and pedagogues like Al-Ghazali, Skinner, Piaget, Vygotsky and others give us an opportunity to have an insight into: 1. How to re-think education, 2. What is the most comprehensive way for a learner to learn? 3. Imagine a new environment that can give a better future especially for a growing child. They are the people who remind us that learning always involve interaction with other people, submitting ourselves to other people's ideas or values not just by ourselves.

Having said that, as Malaysia is the country with Muslim as majority, it make sense why when children were asked what they want to be in the future, the answer will always be a teacher, if not doctor. This profession has long been viewed as a noble profession. This is especially true because it is in line with what Imam Ghazali has said earlier. Teachers are the one who are always giving and delivering knowledge, although we aware that the responsibility should are not on teacher's shoulder alone. As such, teachers are noble person that should be respected, as they are those who have the knowledge and share the knowledge they have with people without asking something in return. This kind of understanding is embedded in young people mind for such along time and hence why it is becoming a dream job. Decades passed, teaching profession is slowly less favored by youth. It is because this profession in present time is no longer merely teaching in classroom but also includes administrative work, not to mentioned the long working hours spent at school. Not only that, in addition to the existing workload, even the role of parenting now, somehow falls under teacher's responsibilities.

While many opt to choose other profession besides teacher, it is then unparalleled to the aspiration by Education Ministry of Malaysia. According to the Malaysia Education Blueprint 2013-2025, the Education Ministry of Malaysia is serious in assuring teaching to become career of choice. As the matter of fact, knowing the piles of workload and responsibilities teacher have to carry, the well being of a teacher is now become a question.

### **Teaching as Profession**

Looking into a broader context of teaching as a profession, Bauer et al. (2006) who studied German teachers found out that almost a quarter of teachers who teach grammar suffered from burnout and less than 15% reported a healthy coping style. Stress experienced by teacher differ not only by gender (Klassen & Chiu, 2010) but also based on teacher's environment (Kovess-Maséty, Rios-Seidel, & Sevilla-Dedieu, 2007) and with urban teachers experiencing more stress than rural teachers (Abel & Sewell, 1999).

Another study which was done qualitatively by Huberman (1993) researching teacher in Switzerland yield a significant result where it was found that teacher with more experience (have more years in service) tend to encounter a period of self-doubt, disenchantment and reassessment, in which their concerns are either resolved with them continuing with their career as a teacher or their deciding to leave as their careers developed. Reasons are because they often feel fatigue, have nervous tension, frustration, wear and tear, difficulties in adapting to pupils, personal fragility and routine. This findings correlates with earlier study which suggest the reasons behind teacher's burnout.

Johnson et al. (2005) in their study revealed that compare to other 26 occupations, teachers reported worse than average scores on physical health, psychological well-being, and job satisfaction. Having the fact that many studies prove how challenging it is becoming a teacher, is no doubt that teaching can be considered as high-stress profession (Gold & Roth, 1993).

### **Teachers in Malaysia**

Having known the condition of teachers abroad, it is imperative to know what its like to be a teacher in Malaysia. When focusing to the condition of teachers in Malaysia, the reports and findings indicated that it is no different than the condition of teachers across the globe. Teachers in Malaysia too, experienced stress. According to National Union of the Teaching Profession (NUTP) (The Sun, 1999), Malaysian teachers experiencing job stress and it is increasing over time. Not only the stress causing job dissatisfaction, it also resulted to teacher's turnover. This unfavorable experience when compare nationwide found out that compare to teachers at other states, teachers at Kuala Lumpur and Selangor area are the most stressful (Abdul, 2005). Considering those area as urban area, the findings is consistent

with study done by (Abel & Sewell, 1999) and (Shernoff et al., 2011). Factors contributed to teacher's stress are parents' high expectation on their child achievement, discipline problem among students and advancement of technologies resulting to students consistently challenges teacher's knowledge as the information is easily 'google'. Stress able to reduce teacher's motivation and have deleterious effects such as alienation from the workplace, absenteeism, and attrition. This situation if left unresolved will lead to the extent of disrupting teacher's well-being.

The professional activities of a person plays an important role as provides the means to gain a living and at the same time contribute to define one's personal identity. For that reason, it is the utmost important that it able to make the individual become aware of their well-being while at the same time offer the basis for economic stability, comfort and safety and consequently of his or her personal and professional achievements. On the other hand, it is also not impossible that it can induce distress and undermine the mental and physical health of the individual as knowingly, all professionals may suffer from purgatory. Certain professional activities are likely to experience those symptoms due to the nature of their work as for instance, teacher. Scholars have included teaching in the list of high-risk jobs due to the exposure of teachers to severe psychological distress and this has been discussed in a great amount of literature (Beer & Beer, 1992; Borg & Riding, 1991; Boyle et al., 1995; Rusli et al., 2008).

Teaching has always been considered as particularly high level of stress profession when compare to other "high-risk profession" (Beer & Beer, 1992; Borg, 1990; Borg & Riding, 1991; Boyle et al., 1995; Kyriacou, 1987 ; Kyriacou & Sutcliffe, 1979). Having notable studies comparing teacher's mental health to other occupational groups indicate that teacher having a high level of mental fatigue i.e., psychological distress and burnout (De Heus & Diekstra, 1999; Finlay-Jones, 1986).

In a study done using questionnaires to rate teacher's experience of stress at school found out about a quarter of schoolteachers regard teaching as a 'very or extremely stressful' job. The job does not merely stressing teachers out but it also comes with great consequences as there are evidence suggesting that teacher's physical and performance at work are affected (Shernoff et al., 2011).

Nevertheless, given abundant reports of teachers experiencing unfavorable situation that potentially lead to them experiencing adverse consequences mentally and physically, many of them still able to adapt to the difficulties in their profession and retain positive work commitment (Shropshire & Kadlec, 2012). The newly emerged model of Psychological Capital (PsyCap) which emerged from positive psychology might explain this occurrence. Findings from study done by Liu et., al (2012) suggested that PsyCap could relieve the symptom of depression and mediate the association between occupational stress and anxiety. In addition, having high level of PsyCap can also help teachers in reducing the negative effects of frequent display of emotional labor (Tamer, 2015). It also helps teachers to become emotionally optimistic and thus able to deal with stressful situation at school (Tosten & Toprak, 2017). This model of PsyCap could facilitate well with Education Ministry of Malaysia's aspiration mentioned earlier.

### **Psychological Capital**

Psychological capital emerged from the positive psychology movement is initiated by Martin Seligman. It is the study of condition that contribute to the happiness or the optimal functioning of individual, group or institution. Seligman raises five factors leading to maximum well-being; positive emotion, engagement, relationships, meaning and purpose and accomplishment. Research on positive psychology has covered a wide issue such as happiness, optimism, self-esteem, hope, resilience, motivation, well-being, flow, strengths and virtues, mindfulness and positive thinking. Seligman discussed the core concept of positive psychology theory through authentic happiness of theory and well-being theory.

In authentic happiness theory, Seligman mentioned that happiness could be experience by people from different types such as through the pleasant life, the engaged life and the meaningful life. The pleasant life refers to feeling positive emotion without conscious reasoning. For example, eating candies because it tastes good or going to fun fair because it's fun. Gaining happiness at this level requires only small amount of effort. The engaged life on the hand is the form of happiness characterized by flow. Seligman describe the flow as the experience people had and totally absorbed in it until they lose track of time. They are not thinking but instead, they merged with what they are doing. This could be experienced by individuals in many activities such as dancing, solving crossword puzzle and at work. In order for flow

to occur, individual has to use their signature character strengths accompanied by some challenge. More flow will occur when the activities have clear goals and feedback. In fact, flow also causes inner motivation and intrinsic reward. Contrast to the pleasant life, this form of happiness needs more effort. Being in flow give strengths to the person as it fills them with positive energy. The other form of happiness is the meaningful life. While flow activities could be engaging, it could also be meaningless. As for example, after doing something, which is not very significant like solving puzzle, people will feel that it is not enough and life is more than this. In order to feel meaning, people have to be engaged in something that has a goal beyond themselves such as politics, religion or family.

Following authentic theory of happiness, Seligman came up with well-being theory. This theory emphasize on the goal of reaching well-being instead of achieving happiness. Like it or not, after all people are motivated to do many things that do not necessary increase happiness. The example could be having children. It was reported that parents to children often experience less happiness but have higher overall well-being. According to Seligman, well-being comprises of five factors: positive emotion, engagement, relationship, meaning purpose and accomplishment (PERMA). Compared to the previous theory where character strength are relevant to engagement, in this theory on the other hand the character strength are relevant in order to maximize well being felt from each factor. Maximum well- being resulted to a state of flourishing. Flourishing can be described as a state of thriving, developing successfully as individuals and as a group.

Seligman then further came up with psychological capital, which comprises four important constructs namely hope, optimism, self-efficacy and resilience. Psychological capital, which derived from positive psychology, emerged due to the imbalance between organizational theories and practices scrutinize underperformance and unproductive organizational cultures, unethical behaviour and ineffectiveness. Less attention was given on how to achieve optimal performance and functioning (Luthans et al., 2007a; Luthans et al., 2015). Luthans et al. (2007a) defined psychological capital (simply PsyCap) as follows:

PsyCap is an individual's positive psychological state of development and is characterized by: (1) having confidence (self-efficacy) to take on and put in the necessary effort to succeed at challenging tasks; (2) making a positive attribution (optimism) about succeeding now and in the future; (3) persevering toward goals and, when necessary, redirecting paths to goals (hope) in order to succeed; and (4) when beset by problems and adversity, sustaining and bouncing back and even beyond (resiliency) to attain success. (p. 3)

Luthans (2002) define psychological capital as a concept that goes beyond human capital (what you know), social capital (who you know) and financial capital (what you have). PsyCap is viewed as "who you are" and "who you are becoming". It is a higher-level, core construct that consists of four dimensions of hope, optimism, resilience and self-efficacy. Studies done previously have shown that PsyCap predicts positive work engagement among employee (Avey, Wernsing, & Luthans, 2008), work performance (Luthans et al. 2008), job satisfaction (Luthans et al. 2007a, b, 2008), and organizational citizenship behavior (Beal et al. 2013).

Psychological capital is the core capacity in which it drives human motivation, thriving for success and performance at work and cognitive functioning. This form of capital originating from within one self and it directs one's behaviour and cognitive functioning (Akçay, 2011; Peterson et al., 2011). The roots and explanatory mechanisms of psychological capital theory are largely drawn from work motivation (Stajkovic, 2006), positive psychology (Lopez & Snyder, 2009), Bandura's social cognitive (1986, 1997) and agency theories (2008), psychological resources theory (Hobfoll, 2002), Diener's (2000) work on happiness and subjective well-being and Fredrickson's (2001) broaden-and-build theory (Peterson et al., 2011; Luthans et al., 2015; Youssef & Luthans, 2013; Youssef-Morgan & Hardy, 2014). With its sound scientific base, PsyCap seems promising in terms of opening the door to gaining better insights into work life and workplaces in contributing to well-being under harsh conditions.

Research on PsyCap has covered extensive topics that signify the needs for implementing positive lens in organizational behaviour. Most of the research relate it with job satisfaction, subjective/personal/psychological well-being, employee commitment, job performance, work happiness,

social support, stress/job stress, intent to quit, burnout and several others (Avey et al., 2010; Ganotice et al., 2016; Li et al., 2014). Increasing topic covering PsyCap shows that the research concerning towards positive psychological states is increasing. Although a lot of research on PsyCap has been done in industrial-organizational contexts, there are strong theoretical reasons to propose that PsyCap could also play important role in educational context, especially concerning teacher's well-being. For instance, school as other organization face challenges on its own way where teachers have to deal with increasing workload and students' discipline problems everyday. It puts a pressure to teacher's professional life and these factors contributed to teacher feeling pessimism, stress and demotivated or in other words, affected teacher's well-being. However, despite the occurrence mentioned, majority of teachers still able to stay positive and adapt to the situation. Based on the literature discussed earlier, this might suggests the role of psychological capital which play important part in teacher's lives.

### Conclusion

From the review that has been done, understanding on how psychological capital can greatly influence individual to achieve optimal performance and functioning has become much clearer. Now, the focus should be address to the influence of PsyCap on teacher's well-being and further how it is linked in order to retain positive commitment towards their profession. Studies on psychological capital in academic setting is still scant and receive little attention though the nature of the job is no different than those in industrial-organization. Future research should consider exploring the level of psychological capital among teachers so that teachers aware of their own inner strength and put more focus on those positive sides rather than on the negative side (e.g, stress, burnout).

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## LEARNING STYLE AND ACADEMIC ACHIEVEMENT: THE MEDIATING ROLE OF SELF-REGULATION.

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### Abstract

This study aimed to identify the mediating role of self-regulation in the relationship between learning styles and academic achievement of undergraduate students in Malaysia. Studies related to learning styles and strategies in Malaysia are mainly focusing on personality characteristics and academic achievement of the students. Less research focused on students' self-regulation as mediator between learning styles and academic achievement, especially at higher education level. This research applied cross-sectional survey. The instrument used was Learning Styles Inventory (Grasha, 1996) to identify students' learning styles. Meanwhile, Self-regulation Questionnaire (Miller & Brown, 1991) was used to identify students' self-regulation. Students' academic achievement was measured through their cumulative grade point average (CGPA) acquired by the students. The population for this study was among undergraduate students from Faculty of Education at five research universities in Malaysia. Samples for this study were selected by using stratified random sampling (n=1000) in which 200 students were randomly selected from each university. Data for this study was analysed by using Structural Equation Modelling (SEM). The findings confirmed that self-regulation acts as mediator for the relationship between learning styles and academic achievement. The result proposed the new agenda for existing policies regarding curriculum and evaluation, teachers' training, the role of parents, communities and government agencies. There are opportunities for students' academic achievement to be improved by implementing such interventions, in line with the country's aspirations as stated in the Malaysia Education Blueprint 2013-2025.

**Keywords:** Learning Styles, Self-regulation, Academic Achievement, Learning Styles Inventory, Self-regulation Questionnaire.

### INTRODUCTION

In the field of higher education in Malaysia, the issue of academic achievement among students in public universities is still relevant to be studied. Educational attainment is an important element for the success of individuals regardless of gender roles, as envisioned in the national education philosophy Malaysia Education Blueprint 2013-2025. Academic achievement acts as a measurement of the success of a student. The transformation of education in Malaysia is now increasingly emphasizes on student-centred learning (Yen, Bakar, Roslan, Luan & Mega, 2005). Students are expected to master skills of independent learning and to be actively involved in the learning process, in line with the philosophy of lifelong learning. To help students master the skills of self-regulation, psychological factors cannot be ignored (Seefeldt, 2005). In the context of learning and academic achievement, a student must have the idea about the abilities, skills and knowledge to complete the learning task and at the same time they should have the expectations about grades of the learning task.

Study by Ho (2004) found that students in Hong Kong have competitive learning index which is the highest among students from other countries. However, their independent index is low. Academic achievement of Asian students as compared to students in the United States were found to be better because they are afraid to fail and not because of self-factors (Eaton & Dembo, 1997). Brooks (1997) on the other hand claimed that students that have poor self-regulation will experience difficulty in web-based courses. However, study by Mousolides and Philippou (2005) found that self-efficacy tend to influence positive achievement of students in Mathematics, while self-regulation negatively predicts student achievement in Mathematics. Different norms and cultures of location of study could influence the finding. Therefore, it is important to carry out a study on learning styles and self-regulation towards academic achievement in the context of education in Malaysia.

Learning style that is favoured by an individual student can help him/her to identify the learning situation and thus can improve learning achievement (Dunn & Biggs, 1995). A study conducted by Bass and Greary (as cited in Ahmad, Jelas & Ali, 2011) have defined a way to determine an individual's academic achievements by recognizing the learning style. Students that used an appropriate and preferred learning style will help them to get higher exam results (Dansereau, 1985; Weinstein & Mayer, 1986). However, there are also a number of students that experienced conflict and problem throughout their learning process when their learning style does not suits the lecturers' teaching style. Due to that, a study on students' learning styles at higher institution level should be carried out to raise awareness on the importance to acknowledge students' learning style. This can help students, parents, lecturer, and educational institution to provide learning environment and teaching methods that are in accordance with the interest of each individual student and helped them during the learning process in the classroom. In addition to that, the pattern of individual learning styles is significant to his/her potential to be successful in education. Therefore, information on learning styles should be put into consideration and is relevant to be reviewed.

Self-regulation refers to the ability to arrange own learning in order to achieve learning goals. It is a psychological construct that has gained educators' attention where learning styles can support active learning and are able to produce good academic achievement (Pintrich, 1999; Schunk & Zimmerman, 2012). Pintrich (2004) stated that self-regulation strategies can be divided into cognitive strategies, metacognitive and learning resources management. Psychological factor is important in developing the skills of self-regulation in the early stages. This is because students who are efficient in self-regulation not only master the skills to organize their learning activities but also has psychological factor that drives them to do so. This finding is in line with past research by Ames and Archer (1988) where they found that the students with intrinsic motivation tend to use strategies to optimize the output of learning. Students are more motivated to regulate their learning activities to achieve learning goals that have been set.

With that, a study needs to be done to comprehensively identify learning styles and student self-regulation as contributing factors in improving academic achievement.

## **METHODOLOGY**

The population for this study was among the students from Faculty of Education at five research universities in Malaysia, which the samples for this study were selected by using stratified random sampling. Total samples for this study were 1000 students, in which 200 students were randomly selected from each university that participated in this study. The determination of

number of sample for this research has took into account the opinion by Gay and Airasian (2000) which stressed that the number of samples that are too small will threaten the generalization of the results.

Data for this study was analysed by using correlation analysis. Instruments used in this research were Learning Styles Inventory by Grasha (1996), which measure learning styles of samples that participated in this research, Self-regulation Questionnaire (SRQ) by Miller and Brown (1991), which measures the self-regulation, and academic achievement is measured by the CGPA of the students that participated in this study.

Next, CFA is the step in providing data by forming a measurement model. The CFA is designed to run the reliability and validity of the model. There are three requirements for testing individual constructs, namely model fit, convergent validity and construct reliability.

## **RESULTS**

The result illustrates the relationship and effects of mediation between learning styles and self-regulation with the achievement of students in public higher education institutions in Malaysia.

### **Learning style, self-regulation and student academic achievement**

There are four main steps in the structural equation model specification model, model identification, model estimation and model evaluation. Model evaluation results are used to test hypotheses and to answer questions of research.

*The proposed model of learning style, self-regulation and student academic achievement.*

Based on theoretical and conceptual framework of the study, the researcher has developed a proposed model for all variables i.e. learning style and self-regulation with student academic achievement. The proposed model is shown in Figure 1.

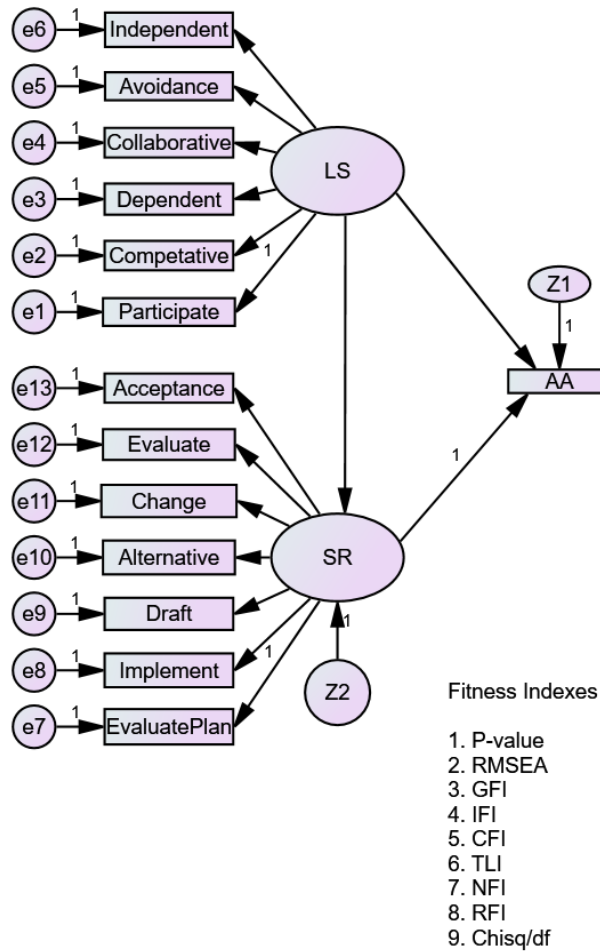


Figure 1. The proposed model for learning style and self regulation with student academic achievement.

Furthermore, following the structural equation model analysis, there are three latent variables i.e. learning style and self-regulation with student academic achievement while 13 variables are observed (function variables) that serve as an indicator of the three latent variables.

*The full model of learning style, self-regulation and student academic achievement.*

The full model of the structured equation as shown in Figure 2 shows the index values corresponds to the model with sample data of value  $\lambda^2 / df = 5.283$ , greater than 1; Root Mean Square of Error Approximation (RMSEA) = .065 is less than 0.08; Goodness of fitness index value (GFI) = .966; Tucker-Lewis Index (TLI) = .941; And Comparative Fit Index (CFI) = .969 which all represent a value greater than the suggested value of greater value than .90. Overall, the results of the assessment show that there is a good compatibility between the models with the data in the sample of this study and the evaluation of each coefficient should be carried out in the next step to test the hypothesis of the study in relation to the relationship between the variables concerned. Significant coefficient paths indicate a significant relationship between the declared variables.

Next, a study on the estimated parameter indicates the weighted regression t for all parameter exceeds a critical value of 1.96 and significant at  $p = .05$  level ( $> \pm 1.96$ ,  $p < .05$ ), which further confirm the relationship between the constructs measured indicators. A summary of the estimated structural parameters of the model in standard form (standardized) are shown in Figure 2.

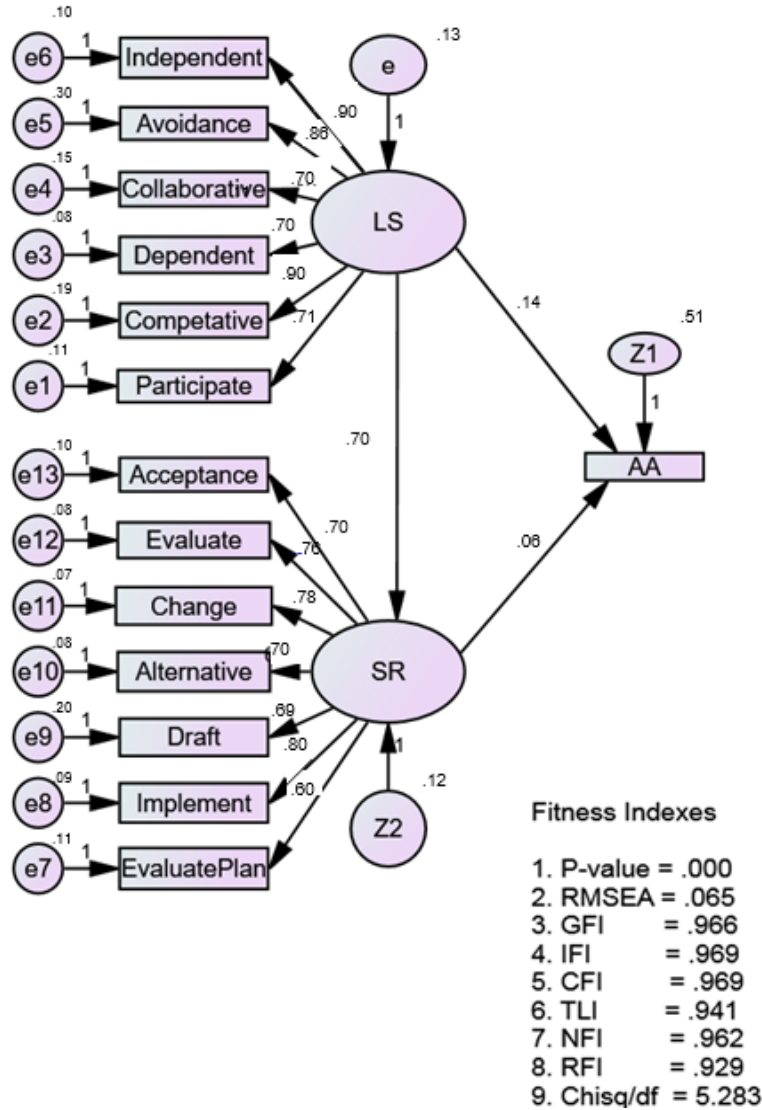


Figure 2. Estimated parameters of the structural model in the standard form (R and R2)

*The learning styles and academic achievement*

The structured equation model as shown in Figure 2 is then summarized by indicating only the coefficient of the path between the exogenous variable and the endogenous variable. Summary of coefficients, critical values and significant levels are shown in the Table 2.

Table 1. Coefficient route for structural model.

	$\beta$	t	p
Learning Style $\rightarrow$ Academic Achievement	25.460	33.142	.000*

\* p is significant at  $p < 0.05$

Based on the results of the assessment coefficient route in the structural model summarized in the Table 1, indicated the results of the structured equation model for the coefficient route between learning style and academic achievement showed significant relationship ( $\beta = 25.460$ ,  $t = 33.142$ ,  $p = .000$ ;  $p < .05$ ). This shows that there is a significant direct relationship between learning style and academic achievement.

#### *The self-regulation and academic achievement*

The structured equation model as shown in Figure 2 is then summarized by indicating only the coefficient of the path between the exogenous variable and the endogenous variable. Summary of coefficient, critical values and significant levels are shown in the Table 2.

*Table 2. Coefficient route for structural model.*

	$\beta$	t	p
Self-regulation $\rightarrow$ Academic achievement	-67.001	18.871	.000

\* p is significant at  $p < 0.05$

Based on the results of the assessment coefficient route in the structural model summarized in the Table 2, indicated the results of the structured equation model for the path coefficient between self-regulation and academic achievement showed significant relationships ( $\beta = -67.001$ ,  $t = 18.871$ ,  $p = .000$ ;  $p < .05$ ). This shows that there is a significant direct relationship between self-regulation and academic achievement.

#### **The mediation effects of self-regulation on the relationship between learning styles and academic achievement**

Result of Table 3 analysis of mediation effect between learning style relationship and self-regulation with academic achievement of students of IPTA

*Table 3. Mediation effect between learning style and self-regulation with academic achievement*

Variables	Indirect effect	Direct effect	p-value
LearningStyles_Self-regulation_AcademicAchievement	0.059	0.038	Significant

The analysis of SEM demonstrated that differences in goodness-of-fit statistics existed among the models with no restrictions, restricted measurement weights, restricted structural weights, and restricted structural covariance. This indicates that the relationships among learning styles, self-regulation and academic achievement. The results of SEM analyses of the effect of learning styles on academic achievement with self-regulation as a mediator demonstrated that learning styles exerted different effects on academic achievement. In general, learning styles had total effects (0.038) on academic achievement. In particular, most of the effects of learning styles on self-regulation were indirect (0.059; 19.76% of total effects) had a insignificant positive effect on academic achievement ( $\beta=0.059$ ,  $p<0.416$ ), with the latter leading to a insignificant increase in academic achievement ( $\beta=0.136$ ,  $p<0.121$ ). Hence, most of the effects of learning styles on

academic achievement are direct (0.700; 80.24% of total effects), with the mediating effect of self-regulation being insignificant.

## CONCLUSION

Previous studies that have been done showed that positive involvement of students during learning process is able to give the best effect on their performance in terms of academic achievement, learning satisfaction and attention given during classroom lessons (Trowler & Trowler, 2010). Therefore, Felder and Henrique (1995) stated that to ensure students are interested to get involved in learning, teaching style used by teachers in the classroom should be in accordance with students' learning styles. Finding from current research has shown that learning styles are strongly related to academic achievement of public higher education institutions students in Malaysia. This finding is supported by research that has been done by Abidin et al. (2011) where they found that learning styles have an impact on students' academic achievement as a whole. Finding from their research showed that students with high academic achievement preferred to study in group as compared to students with low academic achievement. This is because, excellent students prefer learning that involves interaction, views exchange and discussion among them to get a better understanding of what is learned in the classroom. Studies conducted by Bahar and Sulun (2011) towards 184 pre-service teachers in Science Department also acquired a finding that indicates academic achievement is dependent on the student learning styles. In addition, Can (2011) also reviews learning styles of 409 pre-service teachers in Mugla University. In both study conducted by Bahar and Sulun (2011) and Can (2011), the results showed that there is a significant relationship between academic achievements and students' learning styles.

Self-regulation allows students to control their behaviour in order to enhance learning and academic performance. Studies conducted by Livingston (1999) found that self-regulation strategies were used by most students with outstanding academic achievement as compared to students with poor academic achievement and self-regulation has also shown tremendous implications on the teaching and learning process. According to Pintrinch (1995), self-regulation skill is the skill that is beneficial to students because through this skill, they are able to control their own schedule to plan on how they can approach their learning effectively. Finding from current research also showed that students' self-regulation is strongly correlated with academic achievement. This finding is supported by research that has been done by Bail et al. (2008). In their research, they have made a comparison on the long-term effects of self-regulation in learning towards teaching practice that encourage students to practice self-regulation over CGPA of students that participated in the research. The study found out that students that practiced self-regulation in learning showed significant increase of their CGPA for four semesters after the treatment as compared to the students in the control group that did not practise self-regulation in their learning. Rowden Quince (2013) agreed that the students who practise self-regulation in learning will show a positive impact against their academic performance.

This study also found that there was a mediation effect between learning styles and self-regulating relationship with academic achievement of students in IPTA. In a study conducted by Abidin et al. (2011), the study finds that the learning style has an impact on the student's academic achievement as a whole. The findings show that excellent students prefer to practice group learning compared to low achievers. This is because, excellence students prefer interaction

during learning, exchange views and discuss with other peers to gain a better understanding of what is being learned in the classroom. This is also supported by Cuthbert (2005) that the learning style and academic achievement are two interrelated things. Based on the results of previous studies examining the student's self-regulation and academic achievement, it is clear that self-regulation can influence student's academic performance. Students who are able to regulate their efforts to begin learning tasks, setting goals, setting strategies for achieving goals, and monitoring and evaluation of progress will help them to do their best in learning (Chalachew & Lakshmi, 2013).

As a conclusion, data obtained from this research that studied on the relationship between learning styles and self-regulation towards academic achievement of students in public higher education institutions in Malaysia showed strong correlation of learning styles and academic achievement as well as self-regulation and academic achievement, in line researches that have been done previously. This finding will help to serve the body of knowledge with additional literature on the relationship between learning styles and self-regulation towards academic achievement of students in public higher education institutions in Malaysia context.

### **ACKNOWLEDGEMENTS**

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# The Analysis of the Difference between Be-Passive and Get-Passive: Utilizing Light Verb

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## I. Introduction

The passive construction in English is be-passive construction which has a form (be + past participle). However, there is another passive form which is possible. That is get-passive construction which has a form (get + past participle). Thus, the two constructions are identical in that we only think about morphological aspect. There is a difference that exists in considering syntactic and semantic aspects, though. This paper want to look into all syntactic and semantic aspects about which differences between be-passive and get-passive exist.

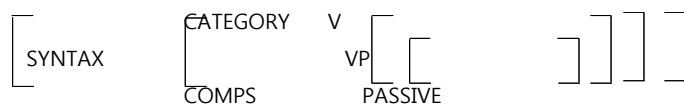
## II. The Difference between Be-Passive and Get-Passive

The two constructions that are be+past participle and get+past participle seem to be similar in surface structure, as you can see examples below.

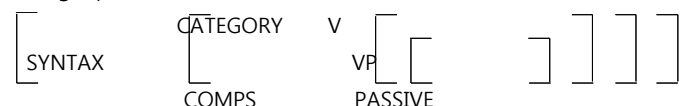
- (1) a. The employee was fired (by the chief-manager).  
b. The employee got fired (by the chief-manager). (Puckica 2009: 216)

Also, these two constructions are similar in that there is a past participle form behind the verb be and get. In addition, according to Culicover(2009), he presented passive constructions using AVM(Attribute Value Matrix) method like below.

(2) be(passive)



(3) get(passive)



According to Culicover(2009) above, we can think that these two constructions are same constructions. However, according to Arts(2013), the verb be in be-passive like below is labeled as passive auxiliary.

(4) This doughnut was eaten by our Head of Department.

So, the verb “be” in be-passive construction can be classified as auxiliary verb and also should have <sup>43</sup>NICE properties which are presented as the properties of auxiliary verb in Arts(2013). However, as you can see the examples below, it is confirmed that get-passive construction can not satisfy properties mentioned above.

(5) a. Tom wasn't arrested.  
b. Was Tom arrested ?  
c. Tom was arrested and Jane was too.  
d. Tom WAS arrested !

(6) a. \*Tom gotn't arrested.  
b. \*Got Tom arrested ?  
c. \*Tom got arrested and Jane got too.  
d. Tom GOT arrested !

But the one point in question is Emphatic stress among four properties. Both be-passive and get-passive construction can be valid in this part. Nevertheless, only be-passive construction can be valid in other three parts, not get-passive construction. Because Emphatic stress is not the property that only auxiliary verb should have, despite the two constructions being valid in this property, it is confirmed that the verb get in get-passive construction has trouble being regarded as auxiliary verb. Rather, the verb get in get-passive construction can be labeled as not auxiliary verb but general verb through examples presented below.

(7) a. Tom didn't get arrested.  
b. Did Tom get arrested ?  
c. Tom got arrested and Jane did too.

Furthermore, there is a difference between verb get and be in tag question.

(8) a. \*He got arrested, gotn't he ?  
b. He got arrested, didn't he ? (Fleisher 2006 : 228)

(9) a. He was arrested, wasn't he ?

---

<sup>43</sup> NICE Property : 1. can have negation not.

2. can invert with subject.
3. can show code phenomena.
4. can have emphatic stress.

- b. \*He was arrested, didn't he ?

Fleisher(2006) argued that the verbal status in get-passive construction can be proved through un-prefixation.

- (10) The gift was unwrapped.  
 a. 'the gift was not wrapped' un+adjective  
 b. 'someone removed the wrapping from the gift' un+verb
- (11) The gift got unwrapped.  
 a. \*'the gift was not wrapped' un+adjective  
 b. 'someone removed the wrapping from the gift' un+verb  
 (Fleisher 2006: 229)

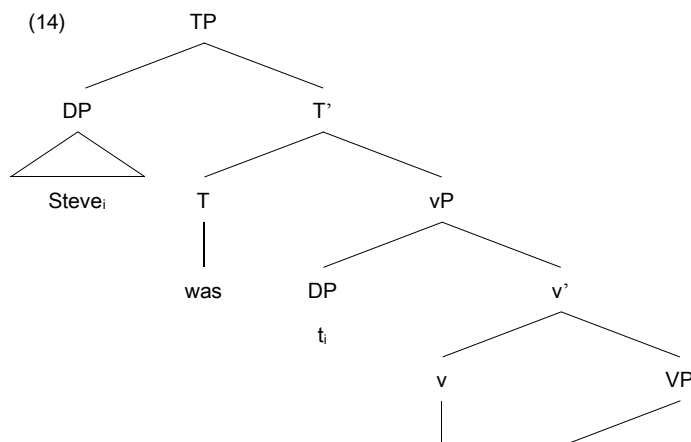
Considering aspect like above, the verb get in get-passive construction would be classified as general verb. However, it is confirmed that the verb be in be-passive construction would not be labeled as general verb like get-passive construction. Also, there is a semantic difference between two constructions.

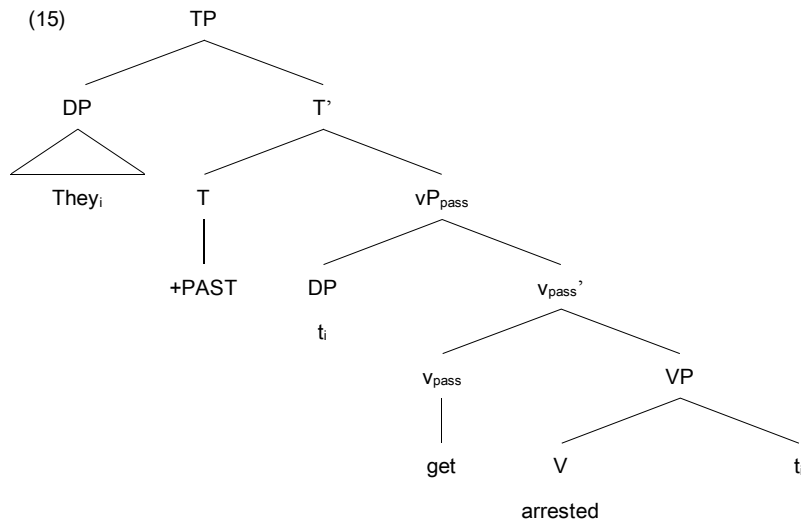
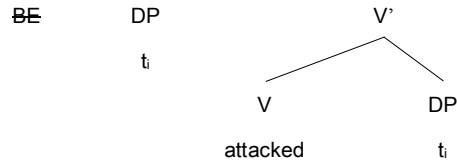
- (12) a. \*Tom didn't be arrested.  
 b. \*Did Tom be arrested ?  
 c. \*Tom was arrested and Jane did too.

In addition, according to Fleisher(2008), he identified that there is a difference between get-passive and be-passive construction through examples like below and argued that there is a need to use  $vP_{pass}$  stratum in analyzing passive constructions.

- (13) a. They all arrested  
 b. \*They got all arrested.

Given these aspects, the tree diagram in be-passive and get-passive construction can be represented like below.





Fleisher(2008) argued that the problem presented in (9a-b) would be solved through the analysis of tree diagram like above. In addition to this, it is represented that get-passive construction has various kinds. According to Collins(1996), get-passive construction can be divided into five kinds like examples below.

- (16) a. Central: A woman got phoned by her daughter who was already on the plane.  
 b. Psychological: I got frustrated by the high level of unemployment.  
 c. Reciprocal/Reflexive: She never got herself dressed up for work.  
 d. Adjectival: His clothes got entangled in sewer equipment.  
 e. Formulaic: I got fed up with sitting in front of my computer.

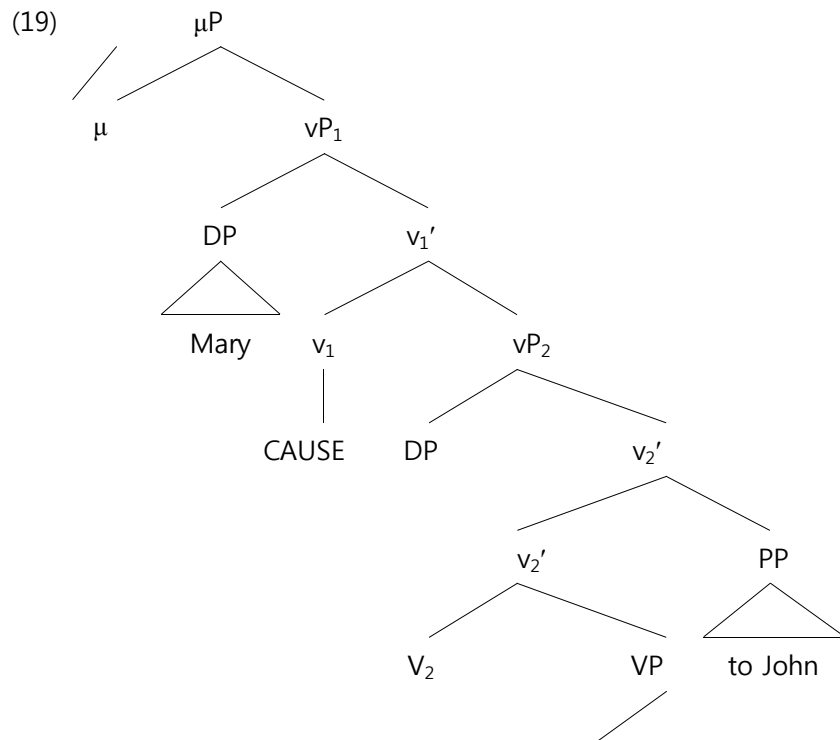
Be-passive construction can be classified like above, though. Also, according Chang(2011), he argued that get-passive construction can be distinguished into three kinds.

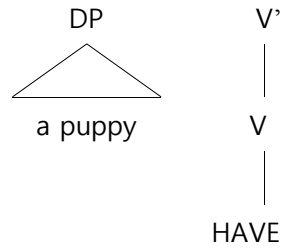
- (17) a. Idiomatic Type: Kelly got lost. (\*Someone lost Kelly).  
 b. Causative Type: They told him to get fired.  
 c. Non-causative Type: The cheeks always get burnt first.

However, it is impossible that be-passive construction can be divided like above. For example, in Causative Type of (17b), if we convert the verb get into verb be, we can identify that sentence would be ungrammatical like below.

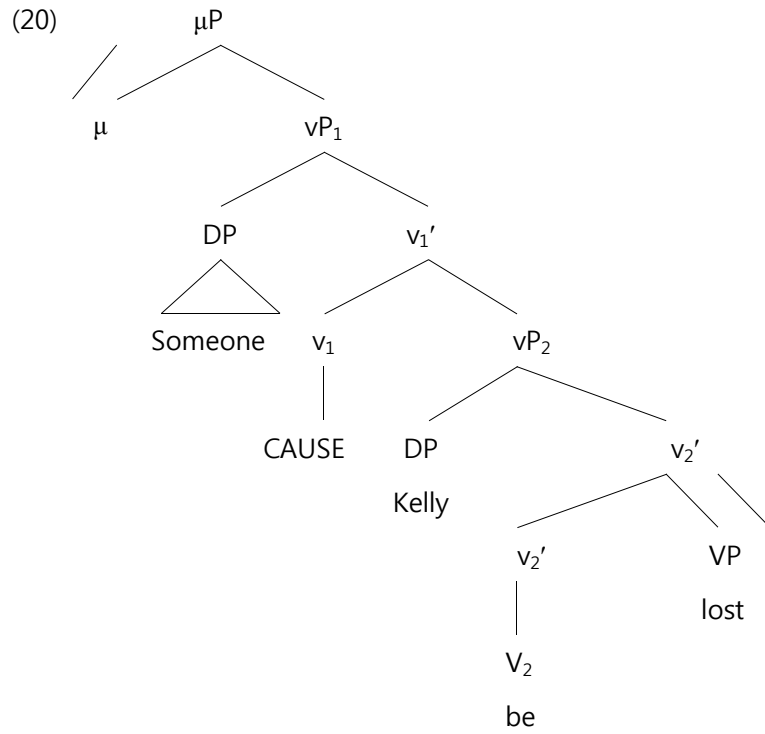
(18) \*They told him to be fired.

Yet, when analyzing get-passive constructions, there is a question that it is necessary to set  $vP_{pass}$  status like Fleisher(2008). I think that this get-passive construction can be analyzed with the same way Hallman(2015) analyzed double object construction with “Cause X to have Y”. Namely, it is possible that we can analyze get-passive construction through “Cause X to be p.p”form. For instance, “Kelly got lost” in (13a) is expressed “Someone cause Kelly be lost” in deep-structure, not in surface-structure. Thus, it is possible that we can distinguish get-passive construction into two kinds, not three kinds presented Chang(2011) like above. In other words, these two kinds are Causative Type and Non-Causative Type. First, Causative Type can be represented like tree diagrams below(20-21) based on Hallman(2015)’s structure.



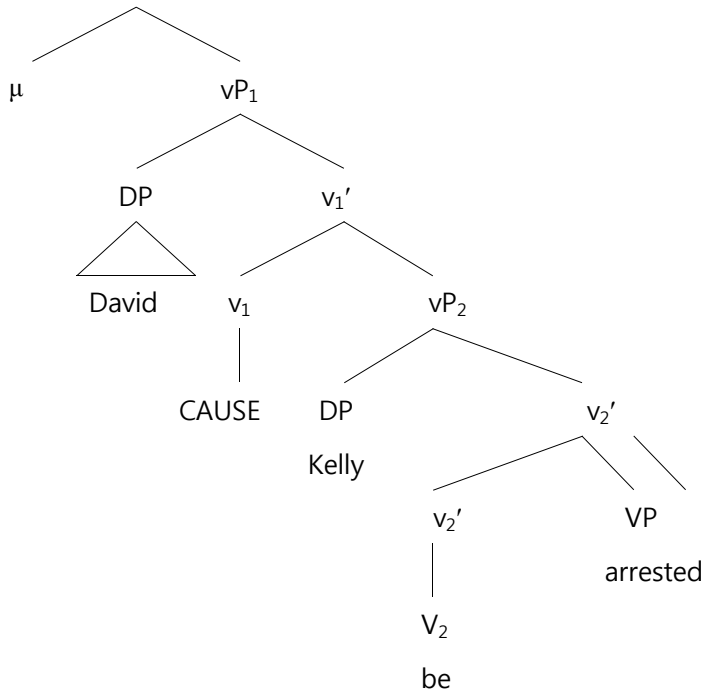


(Hallman 2015: 400)

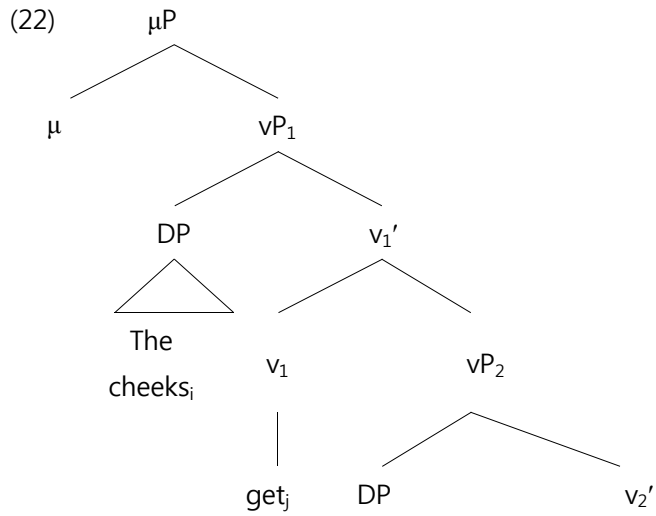


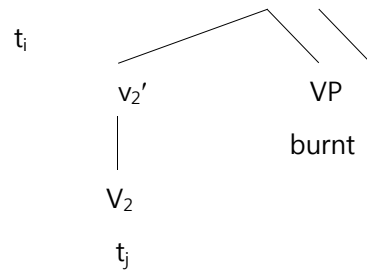
(21)  $\mu P$





So, Non-Causative Type can be represented like structures presented below(22).





Through analysis like above, it is feasible that the type of get-passive construction would be reduced and the fundamental frame of the two types are the same frame as each other. Also, we can analyze the two types with the same functional head.

### III. Conclusion

Considering all the aspects presented hitherto, it is confirmed that be-passive and get-passive construction are different construction in surface structure, but in deep-structure we can think the two constructions are similar or even same at least deep-structure. In addition, the type of get-passive is reduced from three types to two type and not introducing new functional head(status), the two constructions were analyzed with all the same functional heads. Thus, through this analysis, I think that constructions (like become + past participle) which is formally similar can be analyzed like get-passive construction.

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## **Gamification: An Emerging Trend in Education**

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### **Abstract**

This study discusses various aspects of gamification like attention, effects on student motivation, engagement and creativity. These aspects are of crucial importance for educators as well as for learners. Gamification is relatively a contemporary adoption in the field of education. The invention of online video games and its popularity in children has excited educators to analyze the features of games to utilize it for education. The striking behavioral patterns identified include, the level of attention and motivation among the children towards online games. These elements have the potential to facilitate class objectives in an educational setup. Researchers along with the developers are rigorously working on adapting the features of online games to develop games for education in a variety of programs and use the term called gamification for this process. In this paper, I review several studies to depict the trends concerning gamification development in the educational settings. The implications of adapting gamifications in education systems and its consequences are also elaborated.

**Keyword:** gamification, motivation, engagement, creativity

### **Introduction**

The concept of gamification is relatively a recent adoption in the field of education. The increasing popularity of online video games has triggered educators to study in detail about the features of games. Some of the significant characteristics displayed by children playing video games included, the level of attention and motivation. These elements are crucial for any class objectives in an educational setup. Researchers along with the developers now, are rigorously working on adapting the features of online games to develop games for education in a variety of programs and use the term called Gamification for this process. Most of the authors define gamification as the application of game-design elements and game principles in non-game contexts. Huotari & Hamari (2012) conducted a comprehensive literature review on the definitions of gamification. They define it as *“a process of enhancing a service with affordances for gameful experiences in order to support user's overall value creation”*. In this article, I will be looking at different aspects of gamification like attention, effects on student motivation, engagement, and creativity. I state a problem that could be grappled with gamification, and how potentials of gamification adoption could ease the problem in question.

## **Problem Statement**

The emergence of information technology in the last century has transformed the world and has impacted every field, and education is no exception. While it provided tools to streamline course offerings, in administration, online course offerings and e-learning systems, online course portals for course content and classroom management technology among others. On the other hand, with regards to students, online games had mainly aided in distracting the students from their educational obligations. This addiction has raised several issues and there has been growing concern to find ways to detach it from youngsters. During this attempt researchers analyzed the reason behind the popularity of games and its characteristics. It was amazing to see that those characteristics that attract the students towards online games are essentially the same which are necessary for a student to stay focused on the learning objectives. Among the prime characteristics for a student with regards to his/ her involvement in learning are attitude, attention, motivation, engagement, and creativity.

It is easy now to infer that the online games are successful in providing them to the users. While this is achieved by games, the traditional education system that failed to adapt recent technologies and embedded them into their learning environment have shown decline. For example, secondary school students of science have demonstrated decline in students' attitudes, interest, and motivation (Galton, 2009; Osborne, Simon, & Collins, 2003; Potvin & Hasni, 2014). Classroom environment has also been found to be a factor in the decline in students' attitude and motivation towards learning even for other subject areas (e.g., Anderman & Young, 1994; Eccles et al., 1993; Ferguson & Fraser, 1998; Midgley, Feldlaufer, & Eccles, 1989). Literature also addresses the issue of motivation among adolescents (Vedder-Weiss & Fortus, 2011, 2012; Yeung, Lau, & Nie, 2011; Peetsma & Van der Veen, 2015).

The attitudes, interest, and motivation aspects of students towards online games is now utilized to design course elements and can be utilized well to seed motivation among the student and eagerness to learn more of the subject. Development of these interactive games is a challenging task and careful consideration with the involvement of educator is essential for successfully utilizing the strengths of gamification. In the following section detailed discussion is provided for the characteristics of gamification.

## **Characteristics of Gamification**

Gamification borrows different elements from video games to develop educational games. The characteristics of Gamification include game mechanics and game dynamics (Buckley & Doyle, 2014). Some researchers use the MDA framework which stands for Mechanics, Dynamics, and Aesthetics to describe the elements involved in designing games (Hunicke, LeBlanc, & Zubek, 2004). This concept also includes the aesthetics aspect as the look and feel of the game has significance in its attraction. Game mechanics are tools, techniques, and widgets that are used as building blocks of gamifying a website or

application (Game Mechanics, 2010), while game dynamics are described as the emergent behavior that arises from gameplay, when the mechanics are put into use. On the other hand, aesthetics is the emotional response from the players to the gameplay. Lister (2015) reported that computer games are increasingly becoming a part of the daily activities of Canadian students of all ages. Huang and Soman (2013) defined five-part process for applying gamification to the instructional environment and consists of 5 stages as given in Figure 1 below.



Figure 1. Stages of a General Gamification Process

(Source: Huang & Soman (2013, p. 5)

Gamification has supported student motivation and learning but, it can be challenging to implement in the classroom. They further mentioned that incorporating elements of computer games such as points, leaderboards, and badges into non-game contexts is necessary to take advantage of the motivation provided by a game environment. Also, points, levels and leaderboards can be effective in promoting performance (Mekler, Brühlmann, Tuch & Opwis, 2017). These game elements were also mentioned by Brigham (2015) and proclaimed that the greatest attraction of applying gamification to an activity or a course is that it encourages increased involvement and engagement. Nah, Zeng, Telaprolu, Ayyappa and Eschenbrenner (2014) also included prizes, progress bars, storyline, and feedback as design elements in their review article.

### Secondary Outcomes Associated with Gamification

While the focus of gamification is to achieve certain educational objectives, there are several factors that are associated with the process that enhance learning. Motivation, attention, engagement and creativity are some of the prominent factors that are discussed extensively in the literature. Caponetto, Earp and Ott (2014) identified through a detailed examination that the terms motivate/motivation and engagement are recurrently used with gamification. While most of the games have fun element incorporated through a strategy, some games are designed to challenge players (students) to tackle real-world problems, which surges involvement. It is indeed challenging for educators to obtain a balance between learning objectives and to cater evolving student needs. This balance can be achieved through educational games when designed with care. Sailer, Hense, Mayr and Mandl (2017) note that gamification can be a powerful solution if designed well and are built upon well-established implementation models.

Intrinsic and extrinsic motivation is also discussed in the literature with regards to the effects of gamification. Banfield and Wilkerson (2014) conducted a study to assess gamification as a method of experiential learning theory (ELT) on student motivation and self-efficacy. They reported that intrinsic motivation increased dramatically with the introduction of gamification while the increase in extrinsic motivation was insignificant. Some authors believe that substantial empirical research is still necessary to determine whether both extrinsic and intrinsic motivation of the learners can be influenced by gamification (Dicheva, Dichev, Agre & Angelova, 2014). Among other learning oriented observations like increased attendance, participation, and material downloads are also reported in the literature (Barata, Gama, Jorge & Gonçalves, 2013).

Several researchers conducted field experiments to gain insights regarding the use of gamification and how it can impact on achieving class objectives. It was observed that while gamification techniques are effective in supporting classroom learning of content in specific subject areas, they are also utilized to achieve transversal objectives. Li, Dong, Untch and Chasteen (2013) discussed about fostering participatory approaches and collaboration among peers while gamification was practiced in classroom. It also helped students achieve the characteristic of self-guided learning (Watson, Hancock & Mandryk, 2013), and aided students in completion of homework/assignments (Goehle, 2013). With regards to benefits from the teacher's perspective, gamification also made assessment procedures easier and more effective (Moccozet, Tardy, Opprecht & Léonard, 2013).

A recent article by Mekler, Brühlmann, Tuch and Opwis (2017) specifically studies the effects of individual gamification elements on intrinsic motivation and performance. They believed that gamification elements, such as points, levels and leaderboards, may create a sense of competence and can thus enhance intrinsic motivation and promote performance gains. An experiment was conducted that systematically examined how points, leaderboards and levels, as well as participants' goal causality orientation influence intrinsic motivation, competence and performance. To their surprise the results for this specific study demonstrated that points, levels and leaderboards which functioned as extrinsic incentives, were effective only for promoting performance quantity and the effect on intrinsic motivation was insignificant.

Researchers have identified that learner engagement and motivation are closely associated with gamification (Khaled, 2011; Muntean, 2011). A very extensive study was conducted by Looyestyn, Kernot, Boshoff, Ryan, Edney and Maher (2017) to comprehend if gamification strategies are effective in increasing engagement in online programs. The study included a total of 10,499 participants undertaken in tertiary education context. The results indicated positive significant effects in favor of gamification and was concluded that gamification increases engagement in online programs.

The innovative design elements embedded within the game setting has the potential to enhance characteristics of creativity in students (Barata, et al., 2013). Thornhill-Miller and Dupont (2016) discuss in detail about virtual reality (VR) and how it can aid in enhancing creativity and innovation. As they

discussed the potential of VR through structured experiences they highlighted that VR can also optimize task-oriented engagement in the creative process through gamification. Other than those mentioned above, researchers have also observed that gamification has the capability to integrate exploratory approaches to learning among students (Gordillo, Gallego, Barra & Quemada, 2013). As everyone knows, gamification provides instant feedback to the user and this is known to be a crucial element in learning. This instant feedback about the student's progress and the acknowledgement of an accomplished task is very encouraging for any student (Kapp, 2012) and seeds greater engagement and motivation among students in a classroom (Simões, Redondo & Vilas, 2013).

## **Conclusion**

While the benefits of gamification are extensively discussed in the literature, some also alert its usage with caution and its implementation should be smooth. The complete process of gamification should be more meaningful and oriented towards student learning. While there are challenges, the benefits outweigh the drawbacks and it has been proved that gamification has influenced the way education is offered. With the ongoing evolution of information technology, it is clear that designers of games will present more creative ideas which can be applicable in a wide range of subjects. The involvement of educator's experience at the design stage will also enhance the acceptability of the game with increased high motivation leading to learning effectiveness. Gamification in education has the capability to stay and impact the world of education.

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## **Shifting Terrains: Understanding Participation in Jamaican Immigrant Organizations**

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**Abstract:** Immigrant organizations are recognized by scholars, international organizations and government actors as important vehicles for immigrant integration. Jamaican immigrants have established a network of more than 80 Jamaican immigrant organizations in Toronto, Canada alone (Consulate General of Jamaica 2013). However, the results of the Ethnic Diversity Survey (2002) reveal that their participation in immigrant organizations is very low. Underpinning these trends are complex patterns of belonging and complicated relationships with Jamaican identity that require further exploration. Using information from semi-structured interviews with 29 Jamaican immigrants who were members of Jamaican immigrant organizations in Toronto and nineteen Jamaican immigrants who were former members or not involved in Jamaican immigrant organizations, this paper will examine reasons for participation or non-involvement in Jamaican immigrant organizations. Participation in Jamaican immigrant organizations reflects the desire to maintain ties with individuals with a common ethnicity and culture in the new place of residence, the importance of transnational identities for some Jamaican immigrants; and variations in the lived experiences of Jamaican immigrants related to period of arrival in Toronto. Factors influencing non-involvement highlight differences in settlement experiences that limit the abilities of Jamaican immigrants to realize intra-group cooperation. The final section reflects on how group solidarities and patterns of association are continuously contested by complex group dynamics and shifting social terrains.

**Keywords:** Immigrant organizations, Jamaican, Toronto, identity

### **Introduction**

Immigrant organizations are important arenas for civic participation in receiving countries. Immigrant organizations act as venues through which immigrants can achieve a sense of comfort in the receiving country by participating in organizational activities that facilitate transnational ties with the home countries and valorize transnational identities. These organizations also afford opportunities for immigrants to form relationships with other members of their immigrant group. Jamaican immigrants have established a wide variety of organizations to preserve Jamaican cultural heritage and serve the settlement needs and interests of Jamaican immigrants residing in Toronto, Canada. The factors influencing participation in Jamaican immigrant organizations resonate with previous research indicating that involvement in these organizations is often related to immigrants' need to maintain connections with their country of origin, their experiences with exclusion, and the desire to support the development of their communities of origin (Itzigsohn and Saucedo 2002; Owusu 2000; Goldring 2002; Portes, Escobar, Radford 2007). Jamaican immigrants provided additional explanations for involvement and lack of participation in Jamaican immigrant organizations in Toronto.

In the sections that follow, I use information from semi-structured interviews with Jamaican immigrants to examine their reasons for participation or non-involvement in Jamaican immigrant

organizations. Semi-structured interviews were conducted with 29 Jamaican immigrants who were members of Jamaican immigrant organizations in Toronto at the time of the study. Nineteen Jamaican immigrants who were former members or not involved in Jamaican immigrant organizations were also interviewed. While the research sample is not representative of all Jamaican immigrant organizations or the views of all Jamaican immigrants in Toronto, the interview findings provide information about the circumstances shaping involvement in Jamaican immigrant organizations. Information from these interviews will supplement existing knowledge about immigrant organizations established in Toronto particularly how the identities and diverse settlement experiences of individuals within specific immigrant groups influence their participation in immigrant organizations. This paper begins with a descriptive analysis of Jamaican immigrants who were members of Jamaican immigrant organizations at the time of the study. The second section provides a review of the existing literature on immigrant organizations. This review is followed by a discussion of factors that explain Jamaican immigrants' involvement in Jamaican immigrant organizations. I then turn to a discussion of the characteristics of Jamaican immigrants who were not members of Jamaican immigrant organizations as well as explanations for their lack of involvement in these organizations. The explanations provided by participant and non-participant Jamaican immigrants show how the increasing diversity of the Jamaican immigrant population and the changing economic, social and political context of settlement influence the roles of Jamaican immigrant organizations. The research draws attention to how civic participation promotes belonging for some but not all Jamaican immigrants. It shows how interactions between the changing social character of the Jamaican immigrant population and the evolving Toronto context of settlement influences the extent to which Jamaican immigrant organizations are viewed as legitimate avenues for civic participation. Reasons that Jamaican immigrants provided to explain their participation or non-involvement in Jamaican immigrant organizations offer insight into how settlement experiences and expressions of identity vary within the immigrant group.

### **Literature Review: Immigrant Organizations, Place and Transnationalism**

The linkages that immigrants maintain with multiple places manifest themselves in material ways, for instance, through the establishment of immigrant organizations, and in intangible ways, for example, through continued identification with the country of origin. A geographical approach, emphasizing a material and relational conception of place, highlights the role that immigrants' attachments with their countries of origin; settlement experiences; and racial, ethnic, gender, and class identities play in shaping participation in immigrant organizations. Involvement in immigrant organizations is also a form of civic participation that allows individuals to overcome disadvantages associated with lower socio-economic status, become part of the civic life of their country of settlement (Ramakrishnan and Bloemraad 2008) and increase their sense of political efficacy. The literature on transnationalism has tended to focus on immigrant organizations as a common way for immigrants to claim belonging in their countries of residence. These organizations are often created to reinforce attachments to national identities and to the wider immigrant group in the new places of settlement. Immigrant organizations exist in various forms, including hometown, alumni, ethnic, and sociocultural associations (Portes, Escobar and Radford 2007), and are often established on the basis of perceived commonalities in social and historical experiences. Other motives for their establishment are to exploit financial and human resources within the diaspora for political activism and to advance communities in both sending and receiving countries. Immigrant organizations offer several benefits to immigrants. Specifically, they can play an important role in facilitating a sense of belonging through programming which focuses on celebrating community achievements and reinforcing cultural ties and transnational connections. Immigrant organizations may, however, also naturalize and perpetuate exclusions that exist amongst

immigrant groups. Although immigrant organizations play an important role in the settlement and integration of newcomers, many immigrants do not participate in them (Moya 2005) and they are not alone in providing support to immigrants as “formal organizations are only one part of a complex system of networks through which individuals and groups organize” (Rex 1987 in Hopkins 2006).

The literature on immigrant organizations highlights several factors that shape participation in immigrant organizations, including the migration histories of immigrants settling in particular locations, immigrants’ settlement experiences and their transnational identities. Immigrants may demonstrate a greater desire to participate in immigrant organizations in receiving countries where they find a relatively small immigrant population is already present, as their small numbers seem to engender a greater desire to bond with other individuals from the same immigrant population (Williams 2012; Chavez 2005). Immigrants also become involved in immigrant organizations in order to receive support with settlement and integration in the receiving country. For instance, in receiving countries exhibiting significant “cultural differences between the native population and dominant groups,” negative experiences that immigrants encounter during the settlement process may influence participation in immigrant organizations (Schrover and Vermeulen 2005: 825). Political opportunity structures may also influence participation in immigrant organizations due to government and institutionally funded infrastructures that increase possibilities for organizational involvement (Bosma and Alferink 2012). Thus, state funding for immigrant initiatives, including immigrant organizations of course, can also increase opportunities for participating in organizational activities.

Immigrants’ desire to maintain connections and relationships with their countries of origin is still another factor influencing participation. Immigrants can become involved in organizations that are directly involved in home country activities or that conduct activities intended to reproduce the culture and practices of the country of origin (Itzigsohn and Saucedo 2005). Itzigsohn and Saucedo (2005) describe three factors that can affect the participation in immigrant organizations promoting transnational ties. The first, *linear transnationalism*, occurs when transnational practices result from ties that immigrants maintain with their families in the countries of origin, while the second, *resource dependent transnationalism*, occurs once immigrants have sufficient resources to engage in transnational activities (Itzigsohn and Saucedo 2005). The authors contend that resource availability is the more significant of the two for explaining the participation of women in transnational activities. The third factor, *reactive transnational* activities, is a response to exclusionary experiences such as discrimination; however, the authors state that this explanation is relevant primarily to men’s. This factor can also be used to explain participation in immigrant organizations. Negative experiences influence expressions of belonging, particularly the participation in immigrant organizations of male Latin American immigrants. The loss of status that Latin American men experience due to labor market exclusion can inspire them to become involved in organizations that reinforce their masculinity (Goldring 1991; Itzigsohn and Saucedo 2005). Latin American women, on the other hand, are more likely to participate in organizations that provide social services (Itzigsohn and Saucedo 2005). Sense of belonging and emotive and affective relationships with places of origin and destination may influence participation in immigrant organizations. The specificity of the relationship between places and organizational participation requires critical examination for Jamaican immigrants.

A growing literature shows that several social characteristics also influence the likelihood of participation in immigrant organizations in Canada, specifically length of residence, age, and religious and professional background. Using data from the National Survey of Giving,

Volunteering and Participating (2000) and the General Social Survey (2003), Scott, Selbee, and Reed (2006) examined patterns of civic engagement in Canadian society. The authors are particularly interested in whether factors such as “age, gender, education, employment status, household income and length of residence in Canada” influence participation in voluntary activities. Their study focused on immigrant volunteering in sport-related, religious, and recreational organizations and ethnic or immigrant organizations. The authors consider membership rates in voluntary organizations in which immigrants become engaged. Residence in Canada for long periods of time was found to be positively associated with the likelihood of membership in organizations. While this study did not focus specifically on immigrant organizations, this study is one of the few that attempts to explain immigrant participation in voluntary organizations across Canada. The authors highlight how length of residence may influence participation in Jamaican immigrant organizations.

Several additional social characteristics, including age, religious and professional background, also affect immigrants' involvement in organizations. Volunteering was more common amongst immigrants over the age of 55 (Scott, Selbee, and Reed 2006). Age at immigration also had an impact on organizational memberships, in that immigrants who arrived as adults (aged 40-45) were more likely to become involved in organizations (Scott, Selbee and Reed 2006) than those who arrived at younger ages. The authors state, "religious affiliation has a strong influence on volunteering.... [particularly] protestants were most likely to volunteer" (Scott, Selbee and Reed 2006:14). Immigrants with professional backgrounds (76%), particularly managers and administrators (63%), exhibited higher levels of volunteering (Scott, Selbee, and Reed 2006). Volunteering was highest amongst individuals who worked part time.

Reasons typically cited by immigrants for volunteering included supporting a cause they believed in, using skills not used in day jobs, fulfilling religious obligations, and improving access to job opportunities (Scott, Selbee, and Reed 2006: 16). Reasons cited by immigrants for not volunteering were that they are unable to commit the time and money needed to volunteer, they lacked information about how to become involved in volunteer activities, and they lacked interest in volunteering or were dissatisfied with their previous volunteer experiences (Scott, Selbee, and Reed 2006: 17).

Studies of Caribbean immigrant organizations in Toronto by Gooden (2008) and Premdas (2004) demonstrate that the establishment of organizations reflects diverse settlement experiences. Gooden (2008) and Premdas (2004) examined the proliferation of island associations in Canada and their significance for immigrants from the Caribbean. Island associations were limited prior to the 1960s, as the numbers of immigrants from different Caribbean islands were small, leading to the existence of few “formal or informal institutions based on place of birth” (Gooden 2008: 418). As the number of immigrants from various Caribbean islands increased, so did the imperative for organizing based on place of birth. Thus, place of birth began to play a more prominent role in immigrant organizations and may have influenced the desire to participate nationally identified immigrant organizations. The distinct migration and settlement patterns exhibited by Jamaican immigrants in Toronto influenced the emergence of Jamaican immigrant organizations at this time (Gooden 2008); the Jamaican Canadian Association is an example of an organization identified by place of birth (Gooden 2008, Premdas 2004).

Geographical studies of immigrant organizations such as those of Owusu (2000), who studied Ghanaian immigrant organizations, and Mensah (2008), whose research on Ghanaian churches in Toronto showed that religious transnationalism was more likely among Ghanaians who kept in touch with family members in Ghana or had an interest in returning to reside there, explored how the ethnic heterogeneity of the Ghanaian population shapes the organizations themselves. While Mensah (2008) and Owusu (2000) recognize that many immigrants do not belong to organizations, their focus has been exclusively on participants in immigrant organizations and churches. These studies suggest that Jamaican immigrants' diverse identities affect the activities of Jamaican immigrant organizations and influence immigrants' participation in these organizations. But in order to understand the relationships between immigrant identities and the organizations they create, knowledge of immigrants who do not participate in immigrant organizations as well as those whose identities are shaped by organizational participation is required.

Staeheli's (2008) and Mavroudi's (2010) examination of organizations in the USA is useful for highlighting how immigrant organizations become sites of struggle over whose identities and interests are to be represented. Staeheli (2008) argues that in the case of Arab American organizations, visibility through immigrant organizations may be an important way to empower Arab immigrants as citizens. Some Arab Americans, however, may reject the idea of participating as they question the extent to which the organizations represent the diverse views and perspectives of Arab Americans. Arab Americans may experience anxiety about the silencing of their particular backgrounds and interests in an effort to present Arab Americans as a unified group. Similarly, Mavroudi's (2010) found that non-elite Palestinians have a stronger attachment to their communities of origin than elite Palestinians (Mavroudi 2010: 241). As a result, the non-elites are more likely to become involved in transnational activities related to Palestine including involvement in Palestinian organizations.

Churches form an important part of the institutional network through which immigrants claim belonging at their destinations (Agrawal and Quadeer 2008 and Warner 1998). Churches provide important social services that facilitate immigrant adjustment in the country of settlement and they offer emotional and spiritual support to immigrant members. Ley (2008: 2065), for instance, notes that the church has been a place of healing for many who have been "hurt emotionally by family members" and other individuals. Immigrants can also obtain social capital from churches that can be used to facilitate their social and civic integration in the country of settlement (Putnam 2000). Mensah (2009) also emphasized that "racial minority immigrants, in particular, [use churches] and religious practices to counteract the cultural shock, alienation and discrimination they encounter in their adopted countries" (Mensah 2009: 22). While the literature demonstrates that churches remain significant venues for negotiating Black and Afro-Caribbean identities in Canada, it does not consider comprehensively how social, political and economic changes in Canada and changes in immigrant groups since the 1980s affect immigrants' involvement in churches and their affiliation with secular organizations.

This research aims to extend limited research on circumstances influencing involvement and non-involvement in Jamaican immigrant organizations. Scholars such as Moya (2005) and Owusu (2000) emphasize that studies of ethnospecific immigrant organizations focus on demonstrating reasons for involvement and characteristics of organizational membership



without much attention to the circumstances deterring participation in these institutions. By considering Jamaican immigrants who are not involved in Jamaican immigrant organizations, this research shows that immigrants' diverse social identities result in varied experiences of their place of residence and, hence, expressions of belonging in Toronto, particularly involvement in immigrant organizations. The inclusion of Jamaican immigrants who are not involved in Jamaican immigrant organizations also highlights aspects of diversity that complicate attempts to mobilize Jamaican immigrants through immigrant organizations in Toronto.

### **Data Collection**

This study is based on semi-structured interviews that were conducted with Jamaican immigrants who were either members or non-participants of Jamaican immigrant organizations. Organizations considered in this research were selected from an inventory of Jamaican immigrant organizations. I compiled a list of Jamaican immigrant organizations in Toronto from three sources; the Internet, archival research, and information provided by the Jamaican Consular General's Office in Toronto. With an inventory of approximately 83 organizations, I began a process of classification that identified the orientation of each organization. Included in the list of organizations that was considered are those that were founded by Jamaican immigrants. Some organizations in the inventory were identified as a Caribbean rather than a Jamaican organization. Still, organizations such as the Caribbean Chinese Association were classified as Jamaican institutions, as their memberships are dominated by Jamaican immigrants and they host events that celebrate Jamaican heritage. I found that most existing Jamaican immigrant organizations demonstrated at least one of four main orientations: sociocultural, ethnic, political and special interest organizations. Alumni groups, the fifth main orientation, were also well represented among Jamaican immigrant organizations in Toronto. Having categorized the organizations, I selected one organization to represent each of the primary orientations—of Jamaican immigrant—organizations in Toronto. Organizations selected include the Jamaican Canadian Association, the Meadowbrook High School Alumni Association, the Caribbean Chinese Association, The Jamaica Diaspora Foundation and Project for the Advancement of Early Childhood Education. These organizations represent social, alumni, ethnics and political organizations as well as special interest group, respectively. I contacted the executive members of organizations selected to schedule a meeting to discuss my research and the possibility of recruiting members of their organization to participate in the study.

It should be noted that every effort was made to recruit equal numbers of Jamaican immigrant men and women from each organization that was selected and considered in the study, however, an equal sample was not achieved in all cases. The sampling method was reputational in that my initial group of participants referred me to individuals who were qualified and interested in participating in the research. This was the case for the five organizations represented in the study. Networks were critical for building the research sample. The networks included members of Jamaican immigrant organizations who completed interviews during the early stages of the research as well as friends and family members. The second sample included Jamaican immigrants who were not members of Jamaican immigrant organizations. The sample was mixed and the recruitment strategies were also varied in an attempt to recruit individuals from different backgrounds. The non-organizational group comprised 19 individuals, who were former members of Jamaican immigrant organizations in Toronto, Jamaican immigrants who were members of churches and those who had no past or current affiliation with Jamaican immigrant organizations in Toronto.

For the interviews that informed this project, an interview guide or schedule was used with both open and closed-ended questions. The semi-structured interview schedule included questions about the circumstances influencing the migration of the research participants, their experiences with settlement in Canada, their connections with Jamaica, the level of knowledge and experiences with Jamaican immigrant organizations in Toronto, and their views on the divisions within the Jamaican immigrant population in Toronto. Jamaican immigrants who were members of Jamaican immigrant organizations were asked about their experiences and activities with Jamaican immigrant organizations during interviews. These questions allowed me to explore how the migration and settlement experiences of Jamaican immigrants in Toronto influence participation in Jamaican immigrant organizations. A brief survey was also used to gather demographic information from the participants.

### **Characteristics of Organizational Members**

Semi-structured interviews with Jamaican immigrants revealed that the composition of the general membership and leadership of an immigrant organization varies depending on the type of organization being considered. The interviews also indicate that periods of arrival and occupational status are important determinants of membership in Jamaican immigrant organizations. The interviews show trends in participation similar to those reported by Scott, Selbee and Reed (2006) who suggest that retirees and individuals who are employed part-time are more likely to be engaged in the activities of immigrant organizations since they have more time for these activities. Interviews with 29 members of five different Jamaican immigrant organizations revealed that the members of Jamaican immigrant organizations in Toronto are more likely to be retirees with professional backgrounds. This is particularly noticeable for two of the five Jamaican immigrant organizations; the Project for the Advancement of Early Childhood Education (PACE) and the Jamaican Canadian Association (JCA). Retirees made up more than half of the participants from PACE and the JCA that were interviewed. Participants from recently established organizations such as the Meadowbrook Alumni Association that agreed to interviews did not include any retirees.

The findings confirm previous research that suggests that members of immigrant organizations tend to be highly educated (Owusu 2000). More than 50% of respondents, who were members of Jamaican immigrant organizations at the time of the study, had post-secondary degrees including bachelor, professional and post-graduate degrees. Respondents who were members of Jamaican immigrant organizations but not retirees were employed as teachers, lecturers, doctors, consultants and managers at the time of the study. These results are consistent with findings by Scott, Selbee and Reed 2006 and Waldinger et al 2007 who argue that immigrants who participate in voluntary organizations tend to have professional backgrounds and higher levels of education than the immigrant population as a whole. The high educational attainments of participants in immigrant organizations contrast with the low rates of university completion for all Jamaican immigrants in Toronto (Statistics Canada 2006). Jamaican immigrant organizations may attract participants who are better educated, suggesting they are also likely to be more established and have a higher social status than the average Jamaican immigrant in Toronto.

Well-established immigrants are more likely to have the time and resources required to become members of immigrant organizations. More than 80% of the participants from all five organizations are long-time residents of Toronto and migrated to Canada between 1941 and 1978. Interview participants who were members of the JCA, PACE, the Caribbean Chinese

Association (CCA) and the Jamaica Canada Diaspora Foundation (JCDF) arrived in Canada between 1941 and 1950. Participants in the Meadowbrook High School Alumni Organization (established in 2005) migrated later, settling in Canada between 1990 and 2008. The members of the Meadowbrook Alumni Association are more recent immigrants to Canada than members of JCA, PACE, JCDF and the CCA.

The predominance of men in the leadership of these organizations is consistent with research by scholars including Goldring (2001), Itzigsohn and Saucedo (2005) and Owusu (2000) who suggest that gender is an important factor in determining the positions that immigrants hold in an immigrant organization. Every effort was made to ensure that men and women were equally represented in the interviews. As a result, there were no large imbalances in the numbers of women and men that participated. Still, gender emerged as an important factor determining who was elected to leadership positions in Jamaican immigrant organizations. For instance, individuals that hold leadership positions in PACE are predominantly female, perhaps because PACE was initially established as a women-only organization. It is also important to note that women comprised more than 50% of Jamaican immigrants who migrated to Toronto between 2001 and 2006. The percentage of women (61%) in migration streams to Toronto was also highest between 1981 and 1990 (Statistics Canada 2006), the time period during which PACE was established. It is likely that the concentration of Jamaican immigrant women in Toronto created more opportunities for them to establish organizations that represented their interests and settlement experiences. Although men are now allowed to become members of PACE, the organization is still dominated by women who have been with the organization since it was established. In other organizations such as the JCA, JCDF and CCA, leadership positions were occupied mainly by men; women participate in committees or occupy lower level executive positions such as secretary or treasurer in these organizations.

### **Factors Influencing Participation in Jamaican Immigrant Organizations**

Immigrant organizations engender a sense of belonging amongst immigrants by hosting activities and reproducing practices that project these organizations as spaces of comfort and familiarity. Participating in organizational activities that foster a sense of comfort in the new place of residence is particularly important for immigrants whose identities and cultural backgrounds are different from dominant groups. In Canada, despite the existence of an official policy of multiculturalism and programs intended to recognize the country's social diversity, cultural and behavioral norms are defined by whiteness. Whiteness is associated with power and privilege and may create feelings of isolation for visible minorities. The responses of Jamaican immigrants to questions of why they became involved in Jamaican immigrant organizations is consistent with research that highlights the significance of relationship building for immigrants within racialized immigrant groups (Salaf and Chan 2007; Owusu 2000; Sardinha 2009; Portes, Escobar and Walton-Radford 2007). Building relationships with other Jamaican immigrants were particularly significant for immigrants who migrated to Toronto when the visible minority and Jamaican immigrant population was relatively small. Many participants stated that they became involved in Jamaican immigrant organizations to connect with individuals from similar backgrounds and continue their cultural practices. Jamaican immigrant organizations allow some Jamaican immigrants to maintain ties with individuals with whom they share a culture and ethnicity.

The period of time during which Jamaican immigrants arrived in Toronto is also

significant for understanding involvement in Jamaican immigrant organizations. Each period during which Jamaican immigrants arrived was characterized by specific local conditions that influenced the extent to which Jamaican immigrant organizations were constructed as spaces of belonging. Prior to changes in Canadian immigration legislation in 1967, the Jamaican immigrant population was relatively small with 1,500 and 11,000 Jamaican immigrants residing in Toronto by 1960 and by 1970, respectively (Statistics Canada 2006). Jamaican immigrants who arrived in Toronto during the 1950s and 1960s would encounter a very small and scattered Jamaican immigrant population (Williams 2012). Jamaican immigrants were often isolated and many wanted opportunities to socialize with co-ethnics with whom they shared a cultural background and settlement experience. Although immigration policies restricted the migration of non-white immigrants, the discrimination that Jamaican immigrants encountered created the desire to collectively mobilize Jamaican immigrants to address these experiences and provide support that was otherwise not available. Organizations such as the Jamaican Canadian Association (JCA) and the Caribbean Chinese Association (CCA) emerged out of a collective desire to have “a vehicle to enable the occurrence of functions that would provide a bonding mechanism for Jamaican immigrants” (Williams 2012: 19). The fact that Toronto was still adapting to the presence of visible minority immigrants bolstered the importance of building institutions that reinforced the identities of Jamaican immigrants and allowed them to build supportive relationships with each other.

Building relationships with other Jamaican immigrants was a very important aspect of organizational involvement for individuals that became members of Jamaican immigrant organizations that were established between 1960 and 1980 (for example, the Caribbean Chinese Association (CCA) and the Jamaican Canadian Association (JCA)). Providing a space where individuals from the same national or cultural background could socialize emerged as a critical part of the mandate of these organizations in Toronto. For example, the CCA's mandate states that the role of the organization is “to keep [the] community in touch and connected, sustain our culture and heritage, and to build a healthier community” (caribbeanchinese.ca). This objective has stayed with the organizations to some extent. Abner, a member of the Caribbean Chinese Association, was a general practitioner in Jamaica prior to his arrival in Canada. Abner is currently employed as a medical doctor in Toronto. He explained that his involvement in the CCA was socially motivated. He became involved in the CCA in order to establish connections with other Jamaican immigrants in Toronto particularly because he moved to a small town upon his arrival in Canada. It was also a way to settle in and become more familiar with the city of Toronto as a place of residence. More specifically, Abner explained that:

*“When I came back from up north Toronto, I liked the idea of the CCA in that they provided an opportunity for people from the same country to meet ... We met old friends, family and so on... We reconnected and then we met people we knew... When I came in 76, I was in the bush up north and I had no direct connection [with anyone]. But I felt that the reason for the formation of the association [was] because at that time [there was] a whole a bunch of frightened upset people in a strange country. When they formed [the association], [it was] a common meeting ground to cry on one another's shoulder. It was very, very important...” (Abner 1-2).*

The CCA initially functioned as a space of familiarity and comfort where Jamaican immigrants of Chinese origin could receive emotional support during the initial stages of settlement in Toronto. Members of the CCA received emotional support by building relationships with other individuals of Caribbean Chinese descent who had similar experiences of migration. Membership in the CCA also engendered a sense of belonging as involvement provided Jamaican Chinese immigrants with opportunities to reconnect with family members with whom they had lost touch

during the exodus from Jamaica to North America in the 1960s and 1970s. This was a period during which many Chinese Jamaican immigrants were forced to emigrate due to inter-ethnic tensions with Black Jamaicans and opposition to Michael Manley's democratic socialist regime (Shibata 2005).

Members of other Jamaican immigrant organizations also shared stories that demonstrate the significance of relationship building for Jamaican immigrants in the new place of residence. Aaron, a member of the Jamaican Canadian Association who migrated to Toronto in the 1970s as he felt that Canada would offer him a better life and future, explains that meeting with other Jamaican immigrants was his reason for becoming involved in the JCA:

*"It helps to go there and see your fellow Jamaicans, We understand each other and we can talk about back home- any issue come up we can always relate to each other..."* (Aaron 2).

The experiences of immigrants involved in the JCA highlight relationship building as the reason for involvement in the Jamaican Canadian Association during the 1960s. Connor demonstrates the salience of Jamaican identity for Jamaican immigrants but, more importantly, how activities that encourage social interaction among individuals in the same immigrant population are important particularly during periods when the immigrant population in Toronto was not diverse and cultural and racial distinctions from the dominant groups were more pronounced.

Approximately 17 of the 29 respondents who participated in immigrant organizations argued that their involvement in Jamaican immigrant organizations facilitated cultural maintenance and allowed them to stay in touch with other Jamaican immigrants in Toronto. Immigrant organizations are important venues for cultural maintenance particularly for immigrants whose cultures are different from the dominant culture. Conrad, a participant and life member of the Caribbean Chinese Association who migrated to Toronto in 1973 and was employed at a major financial institution prior to his retirement, explained how the Caribbean Chinese Association (CCA) was established and how he became involved in the organization:

*"[In order] to have a community to keep [the] culture and traditions of Caribbean Chinese [people] because there was a big influx of us in 1977. A group of people I know very well, sat down and the first event was a New Year's Eve dance, so that's been a tradition. I've been to every one [of these dances] except two in the thirty-five years. But I got actively involved in a committee in the 80s and I became president and I was part of the executive for a number of years..."* (Conrad 1).

Conrad's history with the Caribbean Chinese Association indicates that cultural traditions were central to organizational activities, particularly at the organization's establishment. Although Conrad was very proud of his achievements and the connections he made through the Caribbean Chinese organization (CCA), he views his participation in the organization as more significant for continuing Jamaican Chinese traditions. Additionally, the creation of a space that was specifically for Caribbean Chinese immigrants suggests that the way in which Jamaican immigrants identify with Jamaica and 'Jamaican' identity has implications for civic participation. Some Chinese Jamaican immigrants identify with both a Chinese and Jamaican heritage. As a result, they become affiliated with organizations that allow them to celebrate plural identification with their country of origin. Besides connecting with Jamaican-Chinese family and friends, Conrad obtained other benefits from involvement in the organization. He gained promotions to senior administrative positions within the organization.

Jamaican immigrant organizations provided a setting where Jamaican immigrants could participate in cultural and relationship building activities that foster a sense of inclusion and comfort in an unfriendly environment. Some respondents suggested that exclusionary experiences influenced their involvement in Jamaican immigrant organizations. Connor, an executive member of the JCA since its establishment in 1962, explained how experiences with racism provided important motivation for establishing an organization that allowed Jamaican immigrants in Toronto to cultivate relationships with people with whom they shared an identity and experiences. As such, motivations to become involved in Jamaican immigrant organizations can be viewed as defensive, as organizations may be a means of promoting a collective response to experiences of exclusion (Schrover and Vermeulen 2005). Connor stated that:

*“...Canada had not been very favorable to bringing non-white people into the country. Canada’s immigration laws were [also] outrightly racist and not many black people were in the country. So in 1962 ...we only had about 3818 West Indians in Canada so it was a very small number. We did not all know each other so when we assembled we began to have a better association with each other. Then the ... whole issue of racism, housing, employment, which I talked about earlier, was also important as we had to work around those things” (Connor)*

Connor’s explanation highlights how, in the 1960s, core activities of the JCA centered around addressing exclusionary and discriminatory practices that Jamaican immigrants in Toronto experienced. The JCA provided a space for the celebration of cultural heritage that fostered a sense of security and support during a time when Canada was still adapting to the increasing presence of visible minority immigrants in Canadian cities. Institutionalized forms of discrimination as well as urban politicians’ unwillingness to reflect the concerns of racialized immigrant groups in local policies persisted during this period (Siemiatycki et al 2003). There was also no legislation guaranteeing respect for the diverse cultural backgrounds of immigrants. Still, Jamaican immigrants had a long history of migration to Toronto and the Black population (of which Jamaican immigrants are part) had created a legacy of institutionalization in Toronto—they established organizations such as the Toronto Anti-Slavery Society and the National Black Coalition that paved the way for the formation of ethno-specific organizations such as the JCA in 1962.

Participation in Jamaican immigrant organizations also demonstrates the significance of a transnational frame of reference for the everyday practices and modes of adaptation for Jamaican immigrants (Satzewich and Wong 2011). For many Jamaican immigrants, involvement in Jamaican immigrant organizations allows them to be engaged in transnational practices that facilitate connections with their country of origin (Simmons 2010; Levitt and Glick Schiller 2001; Portes et al 1999 and Satzewich and Wong 2011). Transnational practices refer to activities that link countries of origin and reception. Some of the respondents who were involved in one of the five Jamaican immigrant organizations considered in this study explained that they joined the organizations because they wanted to make a difference in their country of origin. The following quotes show that some Jamaican immigrants became involved in Jamaican immigrant organizations to become active in transnational initiatives in Jamaica.

Gabe, a member of the Meadowbrook High School Alumni Association, who migrated to Toronto in 1991 to reunite with his wife, explained that joining the association allowed him to maintain connections with his former high school. The Meadowbrook Alumni Association enabled Gabe to become involved in activities that offered the types of financial support needed to deliver educational services to Meadowbrook High school students:

*"[It] is a great opportunity as... we are focusing on something fundamental to the success of [the Jamaican] economy. I don't think it gets the respect it deserves as we are focusing on education and developing students. If you take away the past students association from Wolmers [high school] you wouldn't have what Wolmers [high school] is today. Same thing for KC and St. Georges [high schools] - [our financial support] is critical [for the schools]" (Gabe).*

Collective remittances that are sent from organizations like the Meadowbrook High School Alumni Association help to improve the facilities and quality of education in Jamaica. There are more than 30 Jamaican immigrant alumni organizations in Toronto alone and many schools in Jamaica depend on financial support from these alumni groups for their survival. The remittances transferred by alumni organizations augment inadequate public funding. A wealth of literature shows that many sending country governments rely on the support of transnationals (Wong 2006; Portes, Escobar, Radford 2007; Sives 2012; Itzigsohn 2000; Levitt 1997; Thomas-Hope 1999). Many sending countries are poorer than the countries where migrants settle, so the sending countries often rely on various types of international aid, including financial and collective remittances, to facilitate economic growth and development (Skeldon 1997).

Jamaican immigrant organizations provide Jamaican immigrants with opportunities to be involved in charitable transnational activities that benefit individuals and communities in Jamaica. Mary, a member of the Caribbean Chinese association explained that she joined the CCA due to its philanthropic activities, Mary migrated from Kingston, Jamaica to Toronto, Canada in 1970 due to increasingly unsafe conditions for Chinese Jamaicans that resulted from tensions with Afro-descended Jamaicans during this period.

*"[they do a] bit of charity work... They help schools and ting [sic] up in Trinidad and Jamaica and I appreciate that. So it's nice being involved in a committee where the bottom line isn't money and... making a profit because this is a non-profit organization. So whatever they do and whatever money they make they put back into helping others who are less fortunate... We are West Indians and you are giving back to your own kind in certain ways, you are giving back to the community and I appreciate that..." (Mary 3).*

Mary appreciates the philanthropic work in the Caribbean particularly because it allows her to give back and assist individuals who are in the Caribbean. Engaging in these activities is also an opportunity to maintain connections with communities and individuals in the country of origin. Despite the idiosyncratic factors that encourage Jamaican immigrants to participate in specific immigrant organizations, many Jamaican immigrants become involved in special interest groups and ethnic associations to maintain ties and provide assistance to people in need in their country of origin.

### **Factors Limiting the Participation of Jamaican Immigrants in Jamaican Immigrant Organizations**

Scholars who have written about immigrant organizations rarely examine why immigrants are not involved in immigrant organizations (Goldring 2002; Gooden 2008; Henry 1994; Itzigsohn, and Giorguli-Saucedo 2005; Owusu 2000; Salaff, and Chan 2007). The omission is surprising in the face of recent studies that show that voluntary work and organizational participation by immigrants is relatively low (Ray and Preston 2009; Moya 2005; Owusu 2000 and Scott, Selbee and Reed 2006). This section explores the factors contributing to Jamaican immigrants' lack of participation in Jamaican immigrant organizations. The literature shows that lack of involvement in Jamaican immigrant organizations is shaped by gender, lack of resources and settlement challenges (Itzigsohn and Giorguli-Saucedo 2005;

Sundeen and Raskoff 2009). In this section, the social characteristics and migration histories of Jamaican immigrants who do not participate in Jamaican immigrant organizations are discussed. Interview transcripts are also analyzed to determine how the factors identified in the literature influence lack of participation in Toronto.

### **Characteristics of Non-Participating Jamaican Immigrants**

The migration histories and social characteristics of Jamaican immigrants who were not involved in Jamaican immigrant organizations differed from those of people who were members of these organizations. Former members of Jamaican immigrant organizations in Toronto as well as individuals who have had no experience with these organizations participated in interviews. Jamaican immigrants who were not members of Jamaican immigrant organizations were more recently arrived, younger and more likely to be university educated than participating counterparts. Unlike research participants who were members of Jamaican immigrant organizations in Toronto at the time of the study, 16 of 19 people who were not involved in Jamaican immigrant organizations arrived after 1976. More than 60% of these respondents had at least a Bachelors or College degree. Most Jamaican immigrants in this group were also employed and lived in the City of Toronto.

### ***Factors Deterring Involvement in Immigrant Organizations***

Some Jamaican immigrants argued that lack of participation in Jamaican immigrant organizations in Toronto is not an individual issue. Participation in Jamaican immigrant organizations is informed by historical factors that are reproduced in Toronto and affect cooperation among Jamaican immigrants. Collective organizing and cooperative activity are influenced by post-colonial identities. During the colonial era, the enslaved were discouraged from pursuing many forms of organizing and various cooperative activities (Gilroy 1993; Taylor 1989). Slave masters used to divide and conquer tactics as a means of control. The lack of cooperation that was prevalent in Jamaica's colonial history is reflected in Jamaican immigrants' experiences as post-colonial subjects. These identities are reproduced in organizations established by Jamaican immigrants. The specific ways that the impacts of colonialism play out amongst Jamaican immigrants, however, is defined by the locale where they reside (Bayette 2010). Specifically, the impact of locale on the reproduction of colonialism is evident in the ways that multiple immigrant organizations represent and reproduce historically created social divisions within the Jamaican immigrant population. Immigrant organizations are important sites for civic engagement particularly for racialized immigrant groups that are prevented from gaining equal access to resources in receiving countries. However, these organizations may become arenas where immigrants struggle for resources that facilitate integration and a sense of belonging due to the way in which Jamaican immigrant identities unfold in immigration contexts.

Some Jamaican immigrants suggested that they are less likely to be involved in immigrant organizations and work cooperatively with other Jamaican immigrants because of competition for social capital. In Toronto, Jamaican immigrants compete for the social capital created through immigrant organizations. Recall that social capital involves the resources and social connections that allow groups and individuals to acquire tangible benefits including financial resources and higher social status (Bourdieu 1984). Social capital can potentially be converted into economic capital. The ability to acquire or convert social capital may be challenged so that Jamaican immigrants who do not display behaviors or characteristics of individuals with higher status in immigrant organizations may not be able to gain social capital through involvement in these organizations. Conversely, if immigrant organizations are not perceived as having the types of capital that can potentially facilitate social integration in Toronto then this may reduce motivations for organizational involvement. The Jamaica Canada



Diaspora Foundation is an example of a Jamaican immigrant organization that is distinctive due to members' direct involvement and connections with the Jamaican government and Canadians of influence. The Jamaican Canada Diaspora Foundation has significant social capital due to its connections with influential individuals and members who bring substantial economic capital as a result of their long residence in Canada. Frederick, a member of the Jamaica Canada Diaspora Foundation, migrated to Canada in 1969 to pursue employment and educational opportunities that were not available in Jamaica. Frederick, a retiree, explains the challenges associated with collectively mobilizing Jamaican immigrants and articulates reasons for their lack of involvement:

*"We have a fundamental problem with Jamaica and Jamaicans. Jamaicans in Toronto lead organizations and create them, a plethora, but not a lot of Jamaicans are willing to participate in things if they are not leading. You cannot participate effectively if you do not serve... There are some Jamaicans that would only go to the JCA when a government official is coming. Otherwise, they say they not going to rub shoulders with the ... [lower-class Jamaicans] that they don't want to rub shoulders with. They complain to the Consul General that they are excluded but that is not the case. It is open to all if they wish to participate. When someone is coming they want to be invited... When the Jamaican Prime Minister is visiting... people wanting to know who is on the list. When we were in the crisis, there were people [of a] certain high profile that wanted to come [to the] rescue, but they didn't want to labor in the trenches..." (Frederick 1).*

Frederick's commentary on the reasons that Jamaican immigrants do not participate in immigrant organizations reinforces how ingrained experiences of colonialism continue to impose limitations, albeit psychologically, on collective organizing. In plantation society, slave masters created divisions amongst slaves by developing a hierarchy in which slaves were differentiated based on various social characteristics including occupation. Slave masters would promote some slaves to higher positions in order to engender loyalty to slave masters thereby reducing the potential for slave revolts. Internal divisions and lack of cooperation that originate in the conditions of slavery (Bayette 2010) still affect Jamaican immigrants' involvement in organizations in Toronto long after they migrated from Jamaica. The inability of Jamaican immigrants to organize and mobilize effectively as an immigrant group in Toronto demonstrates the impact of colonialism on the identities of Jamaican immigrants.

Frederick also suggests that class differences limit some immigrants' involvement in Jamaican immigrant organizations. Some organizations attract Jamaican immigrants of a lower social standing. Other Jamaican immigrants may not want to affiliate with these organizations due to their membership. Jamaican immigrants strive to become involved in activities that can facilitate their social mobility. Jamaican immigrant organizations, like the JCDF, may attract individuals attempting to enhance their social integration in a context where they experience racialization and marginalization. Consequently, some Jamaican immigrants may choose to avoid immigrant organizations that do not foster the expansion of their social networks and social capital.

Donna, a Jamaican immigrant who migrated to Toronto in 1977 and has attended the functions of various Jamaican immigrant organizations, has refused to become a member of any Jamaican immigrant organization. She explains that she is discouraged from participating due to the competition amongst Jamaican immigrants. Specifically, Donna states that:

*"... Jamaicans can only boast about one-offs [that is, events that happen only once]... because you know Jamaicans, [anywhere we go, we take over]. In Brampton, the South*

*East Asian community has shown how you build and keep communities together. We are known for the crab in the barrel mentality<sup>44</sup> here... JCA is an organization that has stayed on for 50 years. I can imagine the in-fighting over the years..." (Donna).*

Donna suggests that a crab in the barrel mentality<sup>45</sup> is hindering the progress of Jamaican immigrants in Toronto. The lack of cooperative thinking amongst Jamaican immigrants limits their ability to mobilize, act collectively, and achieve social and political advancement. The crab in the barrel mentality is replicated in immigrant organizations such as the JCA where it becomes evident when Jamaican immigrants fight for resources that might enhance social integration in Canada. Like Donna, Jamaican immigrants refuse to become members of Jamaican immigrant organizations to avoid dealing with the conflicts and divisions among Jamaican immigrants. Again, one wonders whether the debilitating impact of tactics intended to discourage cooperative activity amongst colonial subjects in the plantation era is being reproduced in the institutional culture of Jamaican immigrant organizations. Demonstrating the circumstances that limit cooperative activity among immigrants, Berry (2001) argues that immigrants who settle in societies that marginalize immigrants with racialized identities often create situations of competition within immigrant groups. Competition for favor and status in the receiving country promotes divisions and limits cooperative activity within immigrant groups.

Place and the social identities of Jamaican immigrants work to influence how Jamaican immigrants organize, express belonging and access settlement support in Toronto. The literature rarely considers how participation in immigrant organizations demonstrates how the internal complexity of immigrant groups may result in different intra-group settlement strategies (Veronis 2010; Mavroudi 2010; Hopkins 2006). The diversity of the Jamaican immigrant population is made more complex by diverse settlement experiences that produce variations in expressions of belonging.

Approximately seven of 20 respondents argued that they did not have time to participate in Jamaican immigrant organizations in Toronto. Some of these individuals are recent immigrants who are busy with work, establishing themselves in Toronto and have responsibilities related to their families or church activities that limit the time they have available to dedicate to Jamaican immigrant organizations. For instance, Sharon, a Jamaican immigrant who was sponsored by her family and migrated as a teenager with her brother to Canada in 1976, explained that she was aware of the existence of Jamaican immigrant organizations but issues of time and opportunity limited her participation in these organizations:

*"Of course, I know about the Jamaican Canadian Association. I'm sure there are things going on but just never ... really [sought] out the opportunity... Yeah, there is definitely the lack of time and money you know" (Sharon 1 and 2).*

Additionally, Mark, a former police inspector who migrated to Toronto in 2007 so that his children would have more employment and educational opportunities, stated that that he is not a member of any Jamaican immigrant organization due to his career as a teacher in Toronto and his family obligations:

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<sup>44</sup> A crab in the barrel mentality refers to competitive behavior, within a group, that results in their collective demise.

*"I am not a regular member [of a Jamaican immigrant organization] because I want to focus on teaching. I have lots to learn... I am marking a lot and preparing for class. I want to take it easy for the first few years, confirm my job and then I can know how to move into the 2<sup>nd</sup> year of teaching. But I read the Jamaica Gleaner and Star every day, I watch television Jamaica online, I listen to the station with Jamaican music...it gives me the Jamaica feeling when I drive and listen" (Mark 2-3.)*

Sharon and Mark emphasize that they are focused on work and family responsibilities. They don't have the time to participate in immigrant organizations. Many Jamaican immigrants have low incomes so they do not have the disposable income necessary for membership fees. The financial limitations that restrict Jamaican immigrants' participation in immigrant organizations are consistent with findings in chapter 4 that indicate that, in 2006, more than 50% of Jamaican immigrants earned incomes that were below average for the Toronto, CMA.

Additionally, the cultural events and services offered by Jamaican immigrant organizations to maintain cultural connections with Jamaica may not be necessary for recent Jamaican immigrants who have easy access to goods and services that allow for the preservation of Jamaican identity in Toronto. Respondents like Mark only occasionally attend cultural events hosted by Jamaican immigrant organizations. Instead, they maintain connections with Jamaica by reading Jamaican newspapers and listening to Jamaican music, on-line.

For many Jamaican immigrants, obligations to family as well as the perception of churches as inclusive spaces also influence civic engagement. Michelle, an immigrant who migrated to Toronto in 1987 with her mother, is a respondent who did not participate in Jamaican immigrant organizations in Toronto because she is heavily involved in family, work and church-related activities. When asked if she knew of any Jamaican immigrant organizations or had been involved in any, Michelle explained that:

*"I know of [some organizations] such as the Jamaican Canadian Center, I haven't really been involved. The closest I came to becoming involved in any organizations was at University through research...I think I may not have found or become involved because my focus was on working and helping my mom ...I went to school so time was a factor for about 4 years. And then, to complicate it, I got married before I finished University and I had the first child before I graduated. I think my life just got entangled. So I never had the ...freedom to explore these organizations. I got tied down... but the church was my identity...I found a Caribbean church with people who originated from the West Indies...mostly Black people...they had a huge network...So I found out about all the Jamaican spots...Eglinton and Marlee...it is a social centre...In the church, I don't have to worry about my educational background, my income, how I am going to be seen. You come into the church and that is not there at all...We also do not go out to seek these organizations because we get it here [at church] and it is harder to go and participate freely...because you may feel that some of the things [the organizations do] will not align with what I believe. So Adventists do not eat pork or seafood ... A Seventh Day Adventist...may think it is not the place for me...because it would be hard and they drink [alcohol]... (Michelle 1).*

Michelle's explanation highlights how her personal life and family responsibilities limited her participation in organizational activities. Many Jamaican immigrant women are preoccupied with taking care of their families and finding appropriate employment. As found in 2006 census data, Jamaican immigrant women were better educated than Jamaican immigrant men. Still, the increased propensity for organizational participation that is typically associated with high levels of education (Scott, Selbee and Reed 2006) is nullified by the family responsibilities that women

fulfill in their daily lives. Jamaican immigrant women are less likely to participate in Jamaican immigrant organizations due to lack of time for organizational activities, they are upgrading their educational qualifications and invested in their family responsibilities (Hondagnu-Sotelo 1997).

Additionally, some Jamaican immigrants may only occasionally attend events that celebrate their culture as they receive sufficient spiritual and social support from the churches they attend. Ultimately, church activities gave her many of the benefits that immigrant organizations aim to provide. The church was also a more secure and safer space for participating in activities relevant to her culture. Michelle's church also hosted activities that allowed her to engage with other immigrants from the Caribbean. Michelle also explained that her church is a more welcoming space for individuals from different backgrounds as participation is not shaped or limited by social status. Michelle's story suggests that Jamaican immigrant organizations are perceived as spaces that valorize the experiences, status and interests of well-established Jamaican immigrants in Toronto. Churches are one of the alternative institutions that are an important part of the organizational network that engenders a sense of belonging and comfort amongst Jamaican immigrants. The churches are valorized as neutral spaces of belonging where everyone is welcome regardless of age, social class, and income and where collective activity promotes a sense of belonging. As new organizations, the churches offer spaces where different Jamaican immigrants construct alternative social formations that foster belonging.

### Conclusion

Membership in Jamaican immigrant organizations is continuously being contested by individual circumstances, religious identities, shifting social environments in Toronto and changing dynamics within the Jamaican immigrant population. Jamaican immigrant organizations are important avenues for reinforcing identification with Jamaica as the home country, supporting Jamaican immigrants during their integration into Canadian society as well as promoting development in Jamaica. Nevertheless, complex social, spatial and historical factors limit involvement in Jamaican immigrant organizations. Comparisons between Jamaican immigrants that participate in immigrant organizations and those that are not members of Jamaican immigrant organizations reveal that solidarities based on cultural commonalities are insufficient to mobilize Jamaican immigrants. The factors discouraging and alienating Jamaican immigrants from Jamaican immigrant organizations speak to the diversity of this immigrant group. The Jamaican immigrant population comprises individuals with diverse social backgrounds, ethnic origins and migration histories. This diversity has resulted in struggles for representation that manifest in the multiplicity of Jamaican immigrant organizations as well as social distancing from these organizations on the part of some Jamaican immigrants.

Immigrants' relationships with Jamaican immigrant organizations are complicated by external factors. The struggle and conflict associated with representing the identities of an increasingly diverse immigrant group has resulted in shifts toward groups and institutions that better represent the needs and interests of a broader cross section of the Jamaican immigrant population. The church is increasingly viewed as a space for collective organizing. Churches function as a neutral space where individuals from different social backgrounds, settlement experiences and migration histories feel welcome. Jamaican immigrants are also drawn to religious institutions that integrate the concerns of their congregation into their daily operations and activities.

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## As a Masterpiece of Islamic Arts Kazasker Mustafa İzzet Efendi's Hilye-i Şerif

All books were written and reproduced by handwriting in Ottoman Empire such in all over the world until the invention of printing press. Qurans, praying books, astronomy, science and literary books were reproduced by this method during long years. Those books were written on specially prepared handmade papers by expert calligraphers and also illuminated by decoration artists and then covered meticulously with leather as gifts, especially for sultans, senior statesmen or leaders of foreign countries, So, traditional Turkish Islamic arts were 'Books Arts' at the beginning.

By the increasing of the usage of printing machines, expert calligraphy and illumination artists started to give artworks such as tableaus which are used for decoration on the walls of halls and rooms.

### Calligraphy and Illumination

Especially calligraphy and illumination are main artistic branches of traditional Turkish Islamic arts. Calligraphy is undisputedly an Islamic sourced art. Writing Quran and hadiths (Prophet Mohammed's words) was always supported and praised. Moreover prohibiting of painting and drawing of human and animal figures, Muslim artists tended and furthered in writing and decoration of those sacred words. Eventhough the origin of illumination and decoration arts depends on Middle Asia and Turkish illumination art starts with Uyghur Turks, after acceptance of Islam by Turks, traditional decoration arts were remarkably developed, progressed and reached the summit by Muslim artists.

During for years calligraphy, illumination and also other arts gained their own characters and styles. Calligraphic writing is classified into six main types according to used technical features of letters and by places of use:

- 1- Sülüs,
- 2- Nesih,
- 3- Muhakkak,
- 4- Reyhani,
- 5- Tevki',
- 6- Rika'.

There is also one more commonly used style named as Celi. It can be thought as enlarged writing but for example celi Sülüs is not exactly and mathematically enlarged form of Sülüs. It's valid for Celi Talik and for other Celi letters. (Photo 1)

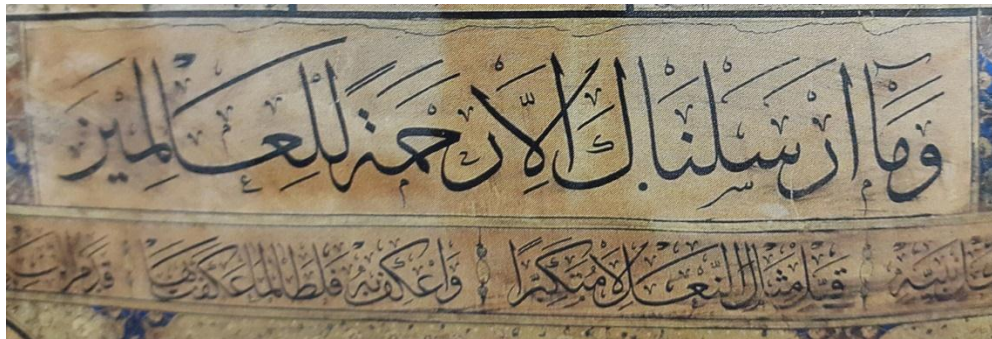


Photo 1

As well as writing the words from Quran and Prophet Mohammed by calligraphy has importance, decoration of those texts and writings is also crucial.



There are thousands of motifs, patterns and decoration elements using in illumination. According to their source in nature, we can classify them as below:

1- Plant originated stylized motifs:

- Leaf,
- Rosebud(goncagül),
- Pench(stylized bird's eye drawing of flowers),
- Hatayi(stylized developed forms of flowers)
- Semi-stylized flowers such as roses, tulips and cloves.

2- Animal originated stylized motifs:

- Rumi
- Çintemani

3- Other nature origin motifs:

- Clouds

4- Geometric patterns, motifs, chains, etc.

### **Application Techniques Using in Illumination**

The main difference between halkar and slim illumination is the sizes of motifs. Motifs are bigger and detailed in halkar. Also application techniques of halkar and slim illumination are very different. In halkar, line drawing(combing) and watering techniques are used. The floor of motifs can be painted or not. Combing is a very difficult technique, takes too much time and is needs patient and experience. But watering is easier compared to combing.

Slim illumination is also difficult and takes too much time and needs to attention and patient. It has many different steps and an excellent sight ability or a magnifier can be needed to see the details. While the floor is left its own colour in halkar, in thin illumination lapis lazuli blue and golden are used mainly and other colors rarely, as floor colour.

Golden is the prominent colour material of illumination. May be for this reason, illumination is known as a palace art since old. Second main colour is lapis lazuli blue. Blue gives a depth and eternity feeling. Beside this, formerly all colours were obtained from nature. But there is hardly not a natural source for blue colour. Lapis lazuli stone is the main known source but it is difficult to find this stone in the nature. So blue was a wealthy colour at least as golden. Although, currently all colours are being produced chemically, blue is still the most common and significant colour using in illumination after golden. It is also important that the balance and coherence between calligraphy and illumination. Motif sizes and application techniques of illumination depend on the size and density of letters. So letters and motifs should be in harmony in many respects.

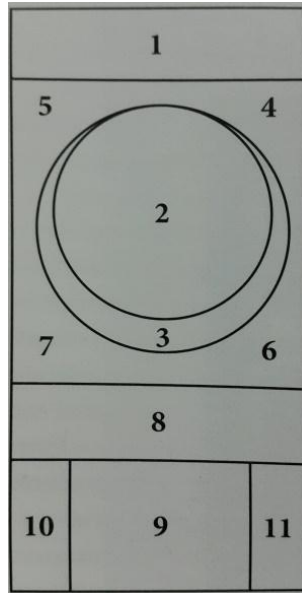
### **Hilye-i Şerif**

Hilye-i şerif is one of the calligraphical designs and includes physical and characteristic features of Prophet Mohammed. The classical form of hilye is literally excellent design as graphically and this classical form is gifted by a Turkish calligrapher to art world. Hattat Hafız Osman is the designer of this classical form of hilye. The first samples of this form are shown in 1679-1680. Until that time, hilyes were written with daily letters to keep in shirt pockets as a sign of respect. Also it is believed that the carrying of hilye protects the people who carry it, from disasters.

A classical hilye includes these following parts:

- 1- Head Station(Baş Makam): Absolutely 'besmele'(I start with the names of the God Allah, Rahman, Rahim) is written here with Sülüs or Muhakkak.
- 2- Belly(Göbek): Most of the hilye text(description and properties of Prophet Mohammed) is written here with Nesih.
- 3- Crescent(Hilal): Nothing is written. Only for decoration.(As a note: Belly and crescent symbolize Prophet Mohammed who brightens the humanity how the sun and the moon light the world.)
- 4- First Corner: The name of the first khalif of Islam, Abu Bekr is written with Sülüs,

- 5- Second Corner: The name of the second khalif of Islam, Omar is written with Sülüs.
  - 6- Third Corner: The name of the third khalif of Islam, Osman is written with Sülüs.
  - 7- Fourth Corner: The name of the fourth khalif of Islam, Ali is written with Sülüs.
  - 8- Verse or Belt(Ayet ya da kuşak): A related verse from Quran with Prophet Mohammed, generally Enbiya, 107th verse is written with Sülüs.
  - 9- Skirt(Etek): Remaining part of the hilye text and a pray are written here with Nesih.
  - 10- Chair(Koltuk): Gaps only for decoration.
  - 11- Chair(Koltuk): Gaps only for decoration. (Form 1)
- There are also samples completely written with Taliq.



Form 1

In decoration of hilye, the surround of whole design is decorated with Halkar in general. The gaps inside hilye are adorned with slim(thin) illumination technique.

In crescent, chair gaps, gaps between the corners, belly and the outer line of hilye, slim illumination is used. Slim illumination includes hatayi group motifs, rumis, clouds, individually or together. There are stops designed in geometric and/or plant form, between the gaps of each sentences in belly and skirt parts.

The inside borders are decorated generally with chains. Sometimes rumi motifs and sometimes negative hatayi tecnique are used as well. Thin borders are usually left without decoration and painted by golden. But different colours can be used on floors rarely.

#### **Kazasker Mustafa İzzet Efendi(1801-1876)**

Kazasker Mustafa İzzet Efendi is one of the expert and competent artist of 19th century. Beside calligraphy, he had a high level of scientific and religious knowledge and he was also a skilled musician able to make hard compositions. He wrote 11-15 Qurans, more than 200 hilyes and different varieties of artworks in great numbers. He is famous with the rounded huge plates in Hagi Sophia, in İstanbul. They have 7.5 m diameters and still the largest inscriptions and the most incredible samples of Celi Sülüs in the world.



Photo 2

He has also calligraphies on Washington Victory Monument which was gifted to The USA Government by Sultan Mahmut II, in 1854. (Picture 2)

Mustafa İzzet Efendi written this unique hilye which is the subject of this article, in 1874, two years before his death. He died on 15th November 1876, while he was 75 years old.

#### **Muhsin Demironat(1907-1983)**

Muhsin Demironat was the competent illumination artist of 20th century. After he lost his father in World War 1, lived a difficult life with his mother. And unfortunately his value wasn't known while he was alive. Because of exploitations, he kept away from illumination during 10 years. In this period he worked as a valuator in courts. A few years before his death, he prepared a gravestone inscription for Aydın Bolak's father. Aydın Bolak was a famous art lover and collector. After completion of this inscription, Mr. Bolak pays him much more than his estimation and Demironat says that: Either I came to the world very early or the people who wanted me to do this job were too late.

During his life he decorated nearly 2500 artworks which includes over than 60 hilyes. Beside those, he prepared numeruous patterns for tiles, wooden works and for other different types of decoration materials.



Photo 3

Washington âbidesinin 17. katındaki Sultan Abdülmejid armaganı kitabı.

He had thousands of patterns in his memory from smallest to the bigger, and he was able to draw them on to paper or on to board immediately if needed. He was also tended to detailed illumination. May be because of those, he ignored or didn't consider the gaps which provide spaciousness in decoration. We can easily see his this application on Kazasker Mustafa İzzet Efendi's hilye.

Because of heart attacks, Muhsin Demironat had a few heart surgeries and he died in 27th June 1983 while he was 76 years old.

#### **Kazasker Mustafa İzzet Efendi's Hilye-i Şerif**

The hilye which is the subject of this article, was written in classical form by Kazasker Mustafa İzzet Efendi in 1874 and illuminated by Muhsin Demironat in 1948. 220cmX120cm sized hilye is a real masterpiece of traditional Turkish Islamic arts and still a unique piece. (Photo 4)

It is not known that this hilye was written for whom. Was there an order or did İzzet Efendi write it by himself, we don't know. The hilye was firstly given to İsmail Hakkı Altunbezer(1873-1946) by an Egyptian to illuminate, probably between 1930 and 1940. But then he never asked the hilye. May be he died. The hilye waited for on the table with a cover on it in Altunbezer's house for years. Prof. Kerim Silivrili also says that he saw this hilye which was tensioned on a wooden board standing back of the door when he went to visit his teacher İsmail Hakkı Altunbezer, while he was a student at academia. He also says that the prepared geometrical stops were designed and some of them were transferred on to hilye.

In a close time to Altunbezer's death, Sami Ozan named person bought this hilye from him and asked to Altunbezer that who could decorate this hilye. It is important because everybody knows that it was not an ordinary artwork. Altunbezer answers the question saying: 'Nobody cannot except for Muhsin. Only he can'.

Muhsin Demironat started to decoration of hilye for Sami Ozan, in 1946. The hilye was exhibited once before it was completed. We don't know the reason why. There is Muhsin Demironat's handwriting note on the back of the photograph of the hilye which was taken during this early exhibition: 'Sami Ozan is a close-fisted man so I had to do this illumination for only 2000 Turkish Liras. And for my house construction, I had to borrow from him 1500 Liras more. He came to my house may be ten times to take this money. When Sami Bey came last time, he saw my mother's dead body in the front room of the non-completed house and he never came again. The God(Allah) gave a mercy into his heart. He died recently . I needed to notice my memory in 1978 to mention the problems of artists.'

The illumination lasted two years and finished in 1948. Muhsin Demironat says for this hilye: 'There is not such a hilye in any museums of the world.' He told Prof. Uğur Derman that he wanted to see his hilye before his death and but unfortunately it couldn't be possible.

According to Kerim Silivrili, the hilye changed a few hands and took place in Ayşegül Nadir Collection, another famous gatherer from Cyprus and then passed to Cengiz Yalçın. Now it is in Zeki Cemal Özen



Calligraphy Collection.

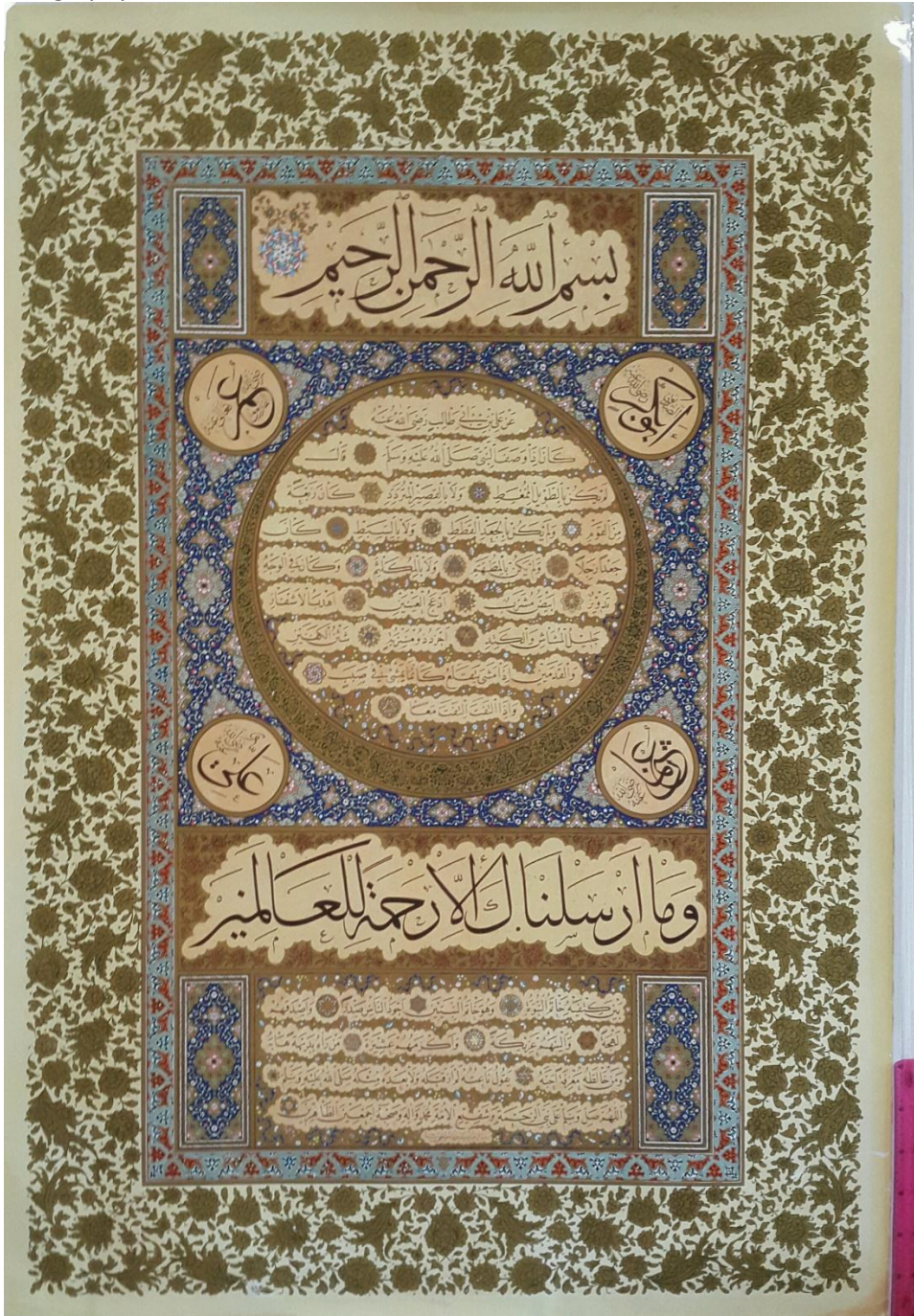


Photo 4(about 1.2 m height print)

#### Illumination Details

As mentioned before, motif sizes of illumination depend on the letters size so letter and motif sizes should be in harmony. Therefore the motifs are very huge and big size in this 220 cmX120 cm sized artwork .

The outer border has 15 cm width. This size is avaregly 3-5 cm in general. For this border pattern, golden watering halkar tecnique was used on the light green painted floor. At the beginning, golden was used to contour the outer lines of each motif. But when it was remarked that the golden contours were



invisible after looking at, a second line contoured around the motifs with the dark of floor green. (Photos 5-6)



Photo 5



Photo 6

There are gorgeous illuminations on chair gaps, on the gaps around the belly and crescent. Slim illumination floor colours are golden and lapis blue in weight. Green and light red were used on small parts as well. Beside flowers and leaves, clouds and rumi forms were also used together with them. The chair gaps near besmele and the skirt are seemed in the same sizes but not. The chair gaps near the skirt are 5 cm longer then the above. But it is almost impossible to see this differences between those designs. This shows the competence of Muhsin Demironat.(Photos 7-8)





Photo 7



Photo 8

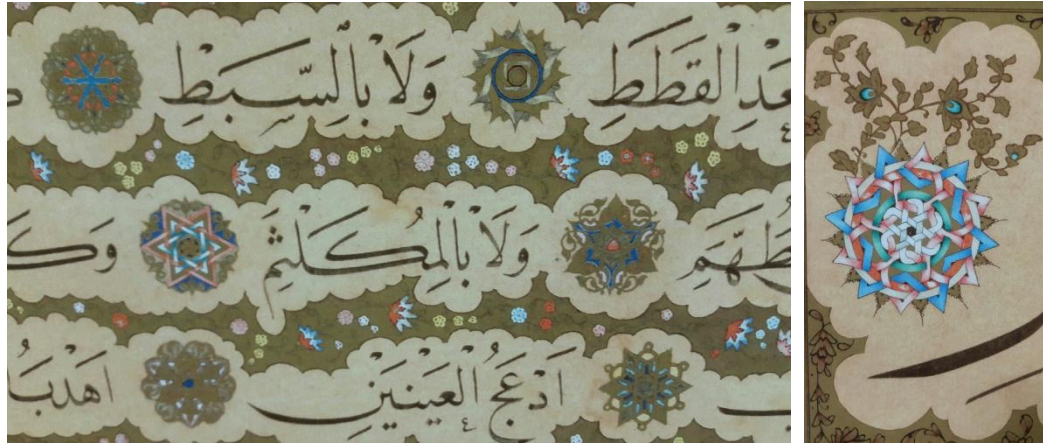
On the crescent area again halkar technique was used. The crescent floor was not painted, left with the original colour of the paper but the floors of motifs were painted with light yellow and then watering halkar with dark green.(Photo 9)



Photo 9



Of course each illuminated area is gorgeous individually but indeed stops are spectacular. These 25 mm diameter 25 stops are such colourful jewels. According to Kerim Silivrili, his teacher İsmail Hakkı Altunbezer drew some of these stops and moreover started to application and Muhsin Demironat didn't change those stops, saved and used. (Photos 10-11)



Photos 10-11

Detailed colorful rumi forms called as 'hurde rumi' were used on the outer wales(moldings) while all other surrounding wales were only painted with gold.(Photo 5)

The gaps between the lines( line-spacing) were decorated with flowers and clouds. Although these paintings known as 'beynessatur' made the appearance so crowded, however all elements, motifs and patterns are artistically beautiful. (Photo 10)

As a final detail, Muhsin Demironat has two signs both on the bottom. One is inside of a left-bottom stop and written with black ink and the other is in the left-side middle of the inner molding. Kazasker Mustafa İzzet Efendi's sign also places on the bottom of hilye, on the final line of skirt text.(Photos 12-13)



Photos 12-13

In conclusion, as a masterpiece of Islamic arts, this hilye-i şerif is still unique in terms of its calligraphy, illumination, size and coherence and harmony of all these. This classical application sample of traditional Islamic arts should be evaluated as a key and a guide and new artist should open new doors by this key and search new comments by this guide. Because as well as art is a bridge between past and today, also it will be a bridge which transfer our artistic values and wealths to the future.

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## **Life chances and the state of marginalization of Indigenous people in a democratic governance system in Bangladesh**

**Lawrence Besra, PhD<sup>46</sup>**

### **Abstract:**

*This paper demonstrates that as a result of the fragile democracy and governance system in Bangladesh, the human rights of the most vulnerable and marginalized Indigenous people have increasingly become a cause for concern. It has revealed that the non-recognition of the Indigenous people in the national constitution and their exclusion from participatory democracy, governance and from mainstream development intervention have undermined their life chances<sup>47</sup> in the country, which in turn, has resulted in systemic exclusion and further marginalization in the society. Along with that the massive dispossessions of land, disruptions of livelihood, lack of access to education, health services, employment opportunities, and social services have encapsulated the Indigenous populations in a vicious cycle of vulnerabilities and marginalization in the country. This paper invokes for a human rights-based approach and urges that the state has a responsibility to emancipate the Indigenous people in the mainstream policy domain and sustain equal opportunities and human rights for everybody irrespective of religion and ethnicity under the existing laws in Bangladesh.*

**Key words:** structural marginalization, systemic discrimination, social exclusion, human rights-based approach and Indigenous people in Bangladesh.

### **Introduction:**

Bangladesh is a country of people with diverse background. More than 45 different ethnic communities comprising of 2.5 million of population out of 160 million of country's total population consistently experience human rights violation, systemic marginalization and social exclusion in Bangladesh. The "Indigenous" (*Adivasi*) term refers to 45 different ethnic groups in Bangladesh (Barkat et al. 2009, p. 27). At present, it has appeared as a contested issue in the challenging political and economic landscapes of Bangladesh. Addressing the issue of Indigenous affairs has been neglected in the current dismal social and political situation in Bangladesh. Standing up to speak for, protecting and defending rights of the marginalized Indigenous people is a challenging task as the Government of Bangladesh repeatedly denies the existence of Indigenous people in both national and International forums. Recently, the Government of Bangladesh has issued a press release on 8 August 2014 not to use Indigenous or *Adivasi* term in the country (The Daily Star, 9 August 2014<sup>48</sup>). The monolithic, nationalistic approach and dominant policy of the state has contributed to multiple vulnerabilities and the

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<sup>47</sup> The term 'life chances' is used here to denote the quality of human life which is associated with a host of socio-economic factors, such as ownership of land and property, access to education, occupation type and access to health and social services, citizenship rights and women empowerment issues. These interconnected indicators have an impact on quality of human development (McIntyre-Mills, 2008, p. 301).

<sup>48</sup> The Daily Star, 2014, "Govt call for not using 'Adivasi' term questioned", August 9, Available at <http://www.thedailystar.net/govt-call-for-not-using-ativasi-term-questioned-36381>, Accessed on 27 August 2014.

limited life chances of Indigenous people, and their existence in this country is at stake (Kamal et al. 2003, p.18). This paper attempts to analyze the historical background of the systemic process of marginalization and social exclusion despite of widely used rhetorical discourse of inclusive governance, effective representation and equal citizenship rights in the democratic country of Bangladesh. A wide range of literature has been reviewed and synthesized from the perspectives of post-colonial lenses and human rights approaches to conceptualize the identity, marginalization and social exclusion of the Indigenous people in a decolonized country of Bangladesh.

### **Identity crisis and marginalization in the national context**

The non-recognition of the Indigenous people in the national constitution has transformed them in to marginalized second class citizens due to the unclear definition and acknowledgement of Indigenous people in Bangladesh (Das, 2011, p. 37). As a result, the Indigenous people of Bangladesh are living with limited citizenship rights and little entitlement in terms of social and political rights. This undermines their life chances and quality of life. Very often, the Indigenous people are victims of ‘racial intolerance and prejudice’ (Amin, 2013, p. 1) under a culturally-sanctioned group-privilege system where Indigenous people are perceived as a second class citizens of the country. The constitution of Bangladesh does not refer to the existence of the cultural and ethnic minorities in Bangladesh as the so-called ‘democracy’ is a prerogative of the dominant majority only (Samad, 1998, p. 3). After an amendment (8<sup>th</sup>, 1985) to the constitution and declaring Islam as the state religion, the foundation pillar of secularism has been shattered, as there is no room for accommodating the minorities within this new state discourse (Mohsin, 2011, p. 160). Consequently, the 45 distinctive ethnic communities in Bangladesh who prefer to be identified as 'Indigenous' or 'Adivasi' in Bengali have been considered under many different derogatory terms such as, ‘Tribal’, ‘*Khudra Jatiswatta*’ (small ethnic communities), ‘*Upazati*’ (Sub-nation), ‘*Pahari*’ (Hilly people), and ‘*Nritattik Jatigosthi*’(Anthropological races) (The Financial Express, 29 April, 2013) in different national policy domains that have created and reproduced a uniform identity crisis, social alienation, and underprivileged conditions amongst the Indigenous communities in Bangladesh. The grass roots demand (The Daily Star, August 10, 2011) of constitutional recognition since the independence in 1971 of more than 20 million Indigenous people, comprising 45 different ethnic communities raised by the Indigenous community-based advocacy organizations on the grounds of injustice, oppression and discrimination as experienced by the Indigenous people across the country is being concurrently denied by the Bangladesh Government. The mono-linguistic dominant policy (Rahman, 2010, p. 23) of the state has largely ignored the existence and well-being of the Indigenous people in Bangladesh at national and International forums. In a briefing to foreign diplomats and United Nations (UN) agencies in Dhaka on July 26, 2011, the Foreign Minister of Bangladesh said that there is no definition of Indigenous people and they should be termed as ‘ethnic minorities’ or as ‘Tribal’ people because they have been residing in this country as “asylum seekers and economic migrants” (The Daily Star, July 27, 2011). A higher level Government official has also stated at the United Nations on May 27, 2011, by ignoring the existence of Indigenous people, that “Bangladesh does not have any Indigenous populations” (The Daily Star, May, 28, 2011). In contrast to the above statements, ‘*The Small Ethnic-Groups Cultural Institutions Act, 2010*’ clearly identifies the ethnic minorities as Indigenous people in Bangladesh (Roy et al. 2010, p. 552).

The constitution of Bangladesh upholds that the State shall maintain ‘respect for International law and the principles enunciated in the United Nations Charter<sup>49</sup>’ (Article 25: 1). Non-compliance of International laws and conventions regarding the rights of Indigenous people is ‘against the principles of the constitution<sup>50</sup>’ of the country. The main focus of the United Nations’ International Day of the World’s Indigenous Peoples in 2013 is; "Indigenous peoples building alliances: Honouring treaties, agreements and other constructive arrangements<sup>51</sup>" and 2014 is "Bridging the gap: implementing the rights of Indigenous peoples" (The Daily Star, 9 August 2014). Despite the UN’s promotion of Indigenous people’s rights, the Government of Bangladesh tends to discard the provision of Indigenous people epitomized in UN treaties and conventions. The International Labour Organization (ILO)’s *Indigenous and Tribal Peoples Convention, 1957 (No. 107)* which has been ratified by the Bangladesh Government on 22 June in 1972 clearly states that:

*“Peoples are regarded as Indigenous on account of their descent from the populations which inhabited the country, or a geographical region to which the country belongs, at the time of conquest or colonization or the establishment of present state boundaries and who, irrespective of their legal status, retain some or all of their own social, economic, cultural and political institutions”* (UN, 2008, p. 7).

The World Bank (WB) has also espoused a functional approach in defining Indigenous people based on their vulnerability and disadvantaged status;

*“Indigenous peoples are as groups with a social and cultural identity distinct from the dominant society that makes them vulnerable to being disadvantaged in the development process”* (Cited in Kingsbury, 1998, p. 420).

The above-mentioned characteristics and relevant features of Indigenous people articulate that they are in a marginalized position in terms of ‘poor political representation and participation, lack of access to social services, and exclusion from decision-making processes on matters badly affecting them directly or indirectly’ (UN, 2008, pp. 8-9). The dearth of recognition in the constitution has plunged Indigenous people into multiple vulnerabilities such as, low levels of literacy and numeracy, inaccessibility to health and social services that result in a poor quality of life. This leads to further erosion in their life chances.

The constitutional recognition can pave the way for emancipation of the diverse Indigenous populations in the mainstream society of the country with citizenship rights and entitlement of social and political rights in a Bengali dominant society. Faruque (2011) argued that:

*“Constitutional recognition is considered as a valuable tool of promoting and protecting the rights of Indigenous people and is an essential element of democratic and plural society, not an exception”*.

<sup>49</sup> The Constitution of Bangladesh, 4 November, 1972, Article 25, (1).

<sup>50</sup> The Chairman of National Human Rights Commission stated in a public meeting in Dhaka, on 31 July 20013, Available at <http://www.prothom-alo.com/national/article>, Accessed on 1 August 2013.

<sup>51</sup> The theme aims to highlight the importance of honouring arrangements between States, their citizens and indigenous peoples that were designed to recognize indigenous peoples' rights to their lands and establish a framework for living in proximity and entering into economic relationships, Available at <http://www.un.org/en/events/indigenousday>, Accessed 1 August 2013.

Even in the mainstream political landscape, the rights and recognition of the Indigenous people is like a “window dressing”. The Election Manifesto of the Bangladesh Awami League in 2008 (Knanak Barman, 2008, p. 18), the current ruling political party stated that:

*“All laws and other arrangements discriminatory to minorities, Indigenous people and ethnic groups will be repealed. Special privileges will be made available in educational institutions for religious minorities and Indigenous people”*.

The bottom line is that there is a discernible gap between promise and implementation, and policy and practices with reference to constitutional provision in addressing the well-being and quality of life by virtue of being citizens in a so called democratic country in Bangladesh. The constitution of Bangladesh serves the rights of people affirming that:

*“All citizens are equal before law and are entitled to equal protection of law and the state shall not discriminate against any citizen on grounds only of religion, race, caste, sex or place of birth”<sup>52</sup>*.

The constitution of Bangladesh provides the fundamental principles of state policy with a view to securing rights for its citizens in terms of food, clothing, shelter, education, medical care, and social security (CPD, 2002). In my view, despite the constitutional provision, the rights of the most disadvantaged Indigenous have not been addressed properly. The issue is that the rhetoric of citizenship rights does not lead to providing a decent standard of living for those who are marginalized by a dismal governance process. Under the fragile democratic and governance system, the social contract does not protect adequately the Indigenous people in Bangladesh.

### **Marginalization, social exclusion and proletarianization**

In the development literature, the term of ‘marginalization’ has no ‘precise definition’ because this term ‘has different meanings to different people’ (Shafie and Kilby, 2003, p. 4). In sociology, this term refers to marginalization as the social process of ‘becoming or being made marginal to’ or ‘having the lower standing within the wider society’ (Anupkumar, 2012, p. 3). In other words, being marginalized indicates being alienated from the society as marginalized people are not considered as a part of the society. Very often marginalization is associated with poor, vulnerable people, minority and ethnic communities who are excluded from meaningful participation in the society, labour market and are not entitled to equal rights in the society.

Scholars like as, Bush and Ayeb (2012, p. 20) point out that marginality is ‘a social position of inferiority-one that is caused not by the actors’ essential features, but by the dominant discourse, law and institutions’. According to them, those who are in a marginal position, they reside distanced or excluded from the mainstream site of power. Arguing that relatively marginality is a fluid concept as cited in Cullen and Pretes (2000, p. 217) ... ‘marginality is much more than a site of deprivation: ... a site of resistance’ where power becomes the central determinant of marginality. They have also pointed that the social constructivist view perceives marginality as a power relationship between a group viewing itself as a “centre”, and consequently viewing all minorities and non-members as marginal or “other”. Scholars like Cullen and Pretes (2000, p. 217) state that social marginality is ‘based on such characteristics as gender, ethnicity, religion, sexuality, occupation or languages’ which construct a margin between core and periphery. Thus, marginalization leads to social exclusion.

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<sup>52</sup> The Constitution of Bangladesh: Article 27, 28 (1).

Apart from social marginality, as Cullen and Pretes (2000) characterized as mentioned above, Bernstein and Claypool (2012, p.186) echoed that ‘Social exclusion may be experienced negatively, both psychologically and physically’. Dr. Lynn Todman, director of *the Institute on Social Exclusion* at the Adler School of Professional Psychology, suggests that social exclusion refers to ‘processes in which individuals and entire communities of people are systematically blocked from rights, opportunities and resources (e.g. housing, employment, healthcare, civic engagement, democratic participation and due process) that are normally available to members of society and which are key to social integration’ (Todman, 2012).

Another scholar named Silver Hilary (2007, p. 15) also argues that ‘social exclusion is a multidimensional process of progressive social rupture, detaching groups and individuals from social relations and institutions and preventing them from full participation in the normal, normatively prescribed activities of the society in which they live’. Cruz-Saco (2008, p. 2) claims that “social exclusion is produced by systematic and institutional discrimination and other forms of rejection that leave out persons or groups from the mainstream system of economic, social, and political relationships”. According to her, excluded persons and groups do not participate in the benefits of social capital with an equal sense of belonging due to discrimination, rejection and intolerance perpetuated through a systemic and institutional framework. For an example, the ethnic groups in a country are also minority groups; they are often marginalized because their traditions, linguistic, and cultural traits are distinctively different from the mainstream population. In this regard, Bellani and D’ Ambrosio (2011, p. 68) also claim that marginalized people are socially excluded and unable ‘to participate in the basic political, economic and social activities of the society in which they live due to persistence in the state of deprivation’ which obstruct their ‘minimum standard of well-being and living’.

The Indigenous people are encapsulated under the vicious cycle of vulnerabilities and marginalization in the country. The Indigenous populations are living under the threat of further land loss either by forcible occupation by local influential powerful people with political linkages or through acquisition by the state in the name of social forestry projects, *Khas* land as well as vested property. If such types of incidents continue within the framework of a ‘*criminalized economic, political and administrative system*’ (Barkat and Roy, 2004, p. 5) in Bangladesh, the Indigenous communities will be even more vulnerable and marginalized.

The dispossessions of land, loss of employment opportunities and eviction from their homesteads have led to the Indigenous populations being in a marginal position and becoming vulnerable and destitute in the Bangladeshi society. Oscar Lewis (1966, p. 24) regarded this process in *the culture of poverty* as an outcome of *lumpen proletariat*. Under this downward proletarianization (Bratsis, 2003, p. 661) process, the marginal and small independent farmers are transformed into wage workers. Robert Redfield (1956, pp. 138-139) has also said in the *Peasant Society and Culture* that the landless labourers would not be able to practice peasantry because they have lost their ancestral lands and they will be transformed into industrial workers, urban social classes, and proletariats. Proletarianization is the ‘set of processes which increases the number of people who lack the means of production, and who survive by selling their labour’ (Tilly, 1979, p.1). Thus, they become the part of proletariat class of ‘exploited workers’ (Bratsis, 2003, p. 661) whose livelihoods depend on the value of their manual labor. They have weaker voices and

minimal representation in the democratic institutions of the country. Under the current situations, the constitutional rhetoric does not guarantee the citizenship rights of the Indigenous people.

### **Systemic Discrimination against Indigenous people in Bangladesh**

The Constitution of Bangladesh does not directly mention the Indigenous peoples, but it is understood that the Indigenous people are the part of the disadvantaged community from the constitutional term, 'backward section of citizens' (The Lawyers and Jurists, 2012). But the reference to "backward segments of the population" is yet to be demystified in Bangladeshi context. On June 30, 2011 the Bangladesh Parliament has passed the 15<sup>th</sup> amendment of the National Constitution (Reflections, 2011). The term, 'backward segment of the population' has been replicated ambiguously in the 15<sup>th</sup> amendment without asserting the term 'Indigenous' to recognize this segment of the population. The Article 23 (a) of the constitution after the 15<sup>th</sup> amendment states that "the state will take initiatives for the development of traditional culture and heritage of 'different tribes and small ethnic communities'" (Chtlaws, 2011) in Bangladesh. After forty years of independence, the constitution of the secular democratic country has replaced '*backward section of the population*' with '*Tribes and Small Ethnic Communities*' to address and identify the Indigenous people in Bangladesh.

The daily English newspaper *New Age* (August 10, 2012) reports that denial of 'constitutional recognition to national minority groups is just depriving many citizens of the privileges of what they are legally entitled to'. Condemning the overtly critical role of the state, Mandal (2007, pp. 4-5) argues that discriminatory laws and policies have led to multiple discrimination and deprivation of Indigenous people. As a result, torture, extortion, land grabbing, forcible eviction, violation against women etc. have been the part of regular nightmares for Bangladeshi minorities. The Minister of Law of Bangladesh in 2012 affirmed that:

*"Anybody or any authorities who are found to be directly or indirectly discriminating against Indigenous people will be dealt with through the law. The rights to culture and self-identity of any citizens are constitutionally recognized. No one can deny them"* (Bdnews24.com, 1 August, 2012).

In contrast, on the eve of celebrating World Indigenous Day 2012, a Bengali daily newspaper (The Prothom Alo, 8 August 2012) reported that there is on-going conflict within the Government about Indigenous issues. Early on March 11, 2012, the Local Government and Rural Development (LGRD) ministry has issued a letter to all district commissioners "restricting" (The Daily Star, 8 August, 2012) the celebration of World's Indigenous People's Day on August 9. The letter instructs all the administrative units to "monitor intensively that no support from the Government side is granted to any programs on Indigenous People's Day". Moreover, the Government has banned the use of the term "Indigenous" effectively, which has obviously sidelined all such groups living in the country and diminished their political, economic, socio-cultural, and land rights. The investigative reports of those daily newspapers have precisely elaborated that Bangladesh Government is in continual denial regarding the existence of Indigenous people in this country because the UN has legitimized some obligations to the Indigenous people. If any country fails to comply with those obligations, her participation in the UN peace keeping mission would be hampered (The Daily Star, 8 August, 2012). The clear motif of Government's political repressive, denial and non-recognition to the Indigenous people has been exposed in the above mentioned newspapers' reports.

Describing the deplorable situation of Indigenous people of North Bengal, Shafie and Kilby (2003, p. 3) argue that ‘discrimination and exploitation lead to their exclusion and marginalization’. A voluntary organization working on Advocacy in Bangladesh, named Voluntary Service Organization (VSO), urges that “Indigenous communities be recognized as highly vulnerable to human rights abuses and injustice as their lack of education and poor access to health services prevent them from forming adequate defenses. Indigenous people in Bangladesh have long been discriminated by the dominant cultures” (VSO, 2009). The website of Indigenous People’s Issues and Resources has also published an article stating that “In north-western Bangladesh, the social discrimination faced by Indigenous people is so severe that many ethnic Bengalis refuse to serve food and drinks to Indigenous persons in rural hotels and restaurants” (IPIR, 2011). The Ethnic Community Development Organization (ECDO), an organization to promote Indigenous well-being, also argues that Indigenous people find it far more difficult to enjoy their fundamental human rights because of discrimination and human rights abuses on the basis of ethnic origin for lack of specific legal mechanisms against such discrimination (ECDO, 2012).

The UNHCR (2008) also notes, ‘It is widely believed that the Bangladesh Government has deliberately undercounted the *Adivasi* population to emphasize their marginality. Lower numbers mean that their legitimate demands can be more easily dismissed or ignored by Governments and thus excluded from relief aid or development programs’. International Labour Organization (ILO, 2006, p. 3) has also acknowledged that “The Indigenous people in Bangladesh are among the most marginalized and excluded groups in society. Poverty and unemployment levels are high due to a number of factors, such as loss of land and forest/natural resource rights, displacement for purpose of modernization and industrialization, and discrimination”.

#### **An invocation for human rights-based approach:**

From the above discussion, this paper has attempted to invoke the human rights approach to revitalize the democratic citizenship rights of the Indigenous people in Bangladesh. The relevance of the human rights of the marginalized Indigenous communities has gained increasing ‘moral and legal legitimacy’ (Bleie, 2005, p.43) around the world as a part of comprehensive development approaches, which promote the rights-based approaches to development after the World War II. It is also surprising that the Universal Declaration of Human Rights 1948 (UDHR) does not reflect any specific reference to minority protection.

Even during the process of decolonization from 1940s to late 1960s, the newly independent states did not give recognition to their own tribal and Indigenous populations. Only one exceptional case exists in the constitution of India in 1947, where ethnic communities have been named as ‘scheduled tribes and tribal (Bleie, 2005, p.46), and they are entitled to protection under the mechanism of the state. The history of specific rights of minorities, tribal and Indigenous populations have been broadly addressed in the International Labour Organization (ILO) Convention 107 on Indigenous and Tribal Populations in 1957, which only came in force in 1967.

The concurrent injustices faced by Indigenous people around the world have led to International consensus, and the UN declared 1973-1982 the decade for Action to Combat Racism and racial

Discrimination. The first Non-Government Organizations (NGOs) conference in 1977 in Geneva brought together spokespersons from every corner of the world for 50 NGOs and 60 Indigenous nations on the specific land rights of Indigenous people. Later, these initiatives urged the Commission on Human rights to establish a Working Group on Indigenous Populations in 1982 with a 'double mandate; to review developments of particular relevance for Indigenous populations and to draft standards' (Bleie, 2005, p. 47). During the period of the draft, many states with big numbers of Indigenous people were against the use of 'self-determination and peoples' in the draft, while ILO Convention 169<sup>53</sup> has recognized the terms, 'peoples and self-determination'. The working group took a decade to formulate the draft and in the mid-1990s it had submitted a draft Declaration on the Rights of Indigenous People to the Commission on Human Rights. The draft declaration is a comprehensive document which incorporates 'rights to unrestricted self-determination, a collective right<sup>54</sup> to ownership, use and control over lands and other natural resources, and rights to keep and develop native religions, culture and education, and to protect cultural and intellectual property' (Bleie, 2005, p. 48) for which the Indigenous people around the world have raised voices for a long time. Later in July 2000 a *Permanent Forum on Indigenous Issues* has been established in UN for promoting partnerships between Governments and Indigenous people around the world.

The Tribal and Indigenous rights are fundamentally interconnected with the modern western technocratic terminology of 'environment and sustainable development' as there are 'sacred relationships with lands, nature and environment' (Bleie, 2005, p. 54) among Indigenous people. The colonialists and later colonial administrators and new state institutions have severely damaged and violated the native sacred laws of the land. The last half of the Twentieth Century intensified commercial exploitation of native lands, forests and natural resources through eco-tourism, mining, forestry, fishing, agriculture and hydro power development. As a result, most of the ancestral lands of Indigenous peoples have been expropriated or occupied by state authorities or private companies or by later settler populations. The Indigenous populations have been speaking before national and International agencies about the devastation and damage caused to them.

A prominent Indian leader from Canada named George Manuel announced his intention to form an International organization for Indigenous peoples to fight for their rights in the United Nations at the first World Conference on the Human Environment held in Stockholm, Sweden in 1972. Later, the *Brundtland Report* in 1989 has emphasized on environmental protection and management in relation to Indigenous people. Similarly, the *Rio Declaration on Development and Environment* which is so called *Agenda 21* acknowledges the vital role of Indigenous people in management and development and calls for recognition of their culture, identity and interests in participation aimed at sustainable development. As a follow up from Rio, another *Convention on Biodiversity* came in to force in 1993. It has also 'acknowledged the importance of recognizing the knowledge held by Indigenous communities and calls for equitable sharing of benefits arising from the commercial utilization of such knowledge and practices. Indigenous peoples and many other rights based organizations have been raising their voices for a long time to gain entitlement rights over lands, natural resources, forests and the environment.

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<sup>53</sup> Bangladesh government has not ratified yet the more comprehensive ILO Convention 169 (Bleie, 2005, p. 48)

<sup>54</sup> The rights of all to be exercised collectively (Bleie, 2005, p. 48)



Based on the UN conventions and International treaties regarding the global Indigenous people, this paper has attempted to invoke the human rights approach to revitalize the democratic citizenship rights of the Indigenous people in Bangladesh. The rhetoric of citizenship rights does not lead to providing an equality and equity for those who are marginalized by a fragile governance system in Bangladesh. This is why this paper invokes the human rights to address “the effective participation of citizens in the governance of collective affairs” (Ulrich, 2003, p. 4) of the Indigenous communities of Bangladesh.

### Conclusion:

The Indigenous people of Bangladesh are undergoing through perennial sufferings due to non-recognition in the constitution, continuous oppression, and exclusion from participatory democracy and the governance process. The systemic discrimination, human rights violations, dispossession from lands, and multiple forms of structural marginalization are a grave concern for the Indigenous people in Bangladesh. This paper represents the expression of my inner feelings and responsibilities beyond the solidarity I feel towards my Indigenous people’s continual struggle for the right to land, education, healthcare services, and access to basic social services. I regard my current research as an effort towards the promotion of human rights, equity, and social justice through the lens of the human rights-based framework for the Indigenous people of Bangladesh. This paper comes to a conclusion with a speculation that either the specific definition and indications of the UN regarding the global Indigenous people is beyond understandable or the essence of International conventions and treaties are largely ignored in the hegemonic political landscape of Bangladesh.

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## THE NICKNAME CHOICES OF UNIVERSITY STUDENTS

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### **Abstract**

Every one of us has been given a name which will define us for a lifetime. Most of us keep it till dead. But our names are rarely our choices. It emphasizes the perspective about life of our elders. The modern technology gave a new chance to everyone to redefine themselves. On the virtual world of internet, you can choose a new name which is called a “nickname”. So we have a new chance to pick up a name which only depends on our taste. Besides this name does not have to be a common name we face every day on our society. We can choose animal names, heroes, fiction character names, abbreviations, and any made up name we want. Upon choosing a nickname people depend on their self-esteem. They try to announce to the world whomever they think they are. So those nicknames can be used as data to analyze internet users’ self-esteem. The nicknames they choose may have important clues about their view of themselves. For this research 1000 students from Gumushane University are answered a very short nine question survey. All the data has been collected by paper-pen conventional method. The participants are from three different faculties and 9 different departments. Those 3 Faculties have total 4400 students so 1000 students are a quite large sample size. This study showed us that most of the participants are using Facebook, Gmail, Hotmail, and Instagram. Some web services like Pinterest, LinkedIn etc. are not very common among those students. A great percentage of those students use their real name or partially its abbreviation as nickname. Only a few of them has chosen a different nickname. Those who has chosen a nickname prefer symbolic names for homeland, animal, Movie character names etc. The results of this study are hoped to be helpful for anyone who is interested the effect of internet on university students. Further studies may be need to analyze the motivational factors behind their preferences. Also studies on online game players may be more revealing because they choose their nickname depending on a more deliberate decision.

**Key words :** Nickname Preferences, Higher education, University Students, Self esteem

### **Introduction**

On most cultures names are given by parents and live with us until our death. They are a part of us and define the attitudes or beliefs of our parent’s or ancestors. Çelik defines names as a communication code in cultural systems (Çelik, 2006). Unfortunately, it does not reflect the opinions of people about themselves but instead it shows the opinions of their parents or ancestors.

Twentieth century digital world gives a new chance for online people to define themselves with “Nicknames”. They can choose a new definition for themselves and its strongly related with their personal self-perception. Investigating this nicknames may give relevant clues about their owners.

This study has been executed on 1000 university students from Gumushane University / Turkey. Female and male students are almost equal and they have an average age of 21.

It has been observed that most students are using Facebook, Gmail, Hotmail and Instagram but Yandex, Pinterest, LinkedIn, yahoo are fairly used. With the descending order other online platforms seem to be YouTube, Google and twitter. Most of them are using their own name, combinations with their name or abbreviations of their name as nicknames. It is an interesting result because even they had a chance of re defining themselves with an own chosen nickname most of them did not to prefer doing so.

There are only a few studies about nicknames (115 results on science direct journals by title and keywords) and they are fairly related to the same aspect of view with this study. For example, V. de Klerk and B. Bosch investigated English nicknames according to sound patterns (Klerk and Bosch, 1997)

Yu and Wu (2011) find that participants assigned to the self-choice and real-name identity revelation modes tended to view their assessors more favorably than those in the anonymity and nickname groups.

In another study Clark (1976) states that from the second half of the twelfth century there survives a considerable corpus of citizen's nicknames; and these show that French forms, although in widespread use and even at times coupled with Anglo-Saxon personal names, were on the whole less original and less picturesque than English ones. But none of this limited studies are interested in the reasons of nickname preferences of digital users. This study seems to be a fore-ground study about nicknames preferences.

### **Aim of the study**

Our family gives us a name which defines their view point of life. But Internet gives us a chance to define ourselves. Our nick name choices may give clues about our self-perception. For this reason, the best group could be the online game players. They use many different nicknames.

This study has been tried to accomplish on an online game platform. Kongregate is one of the first online game platforms and it is still a very popular one. Besides top ten games on every genre is published on the game site so for this research most preferred games by online game players could be choosen. It was not possible to contact to site owners so we tried to paste the survey link on chat platforms in kongregate, but KONGREGATE did not allow us to distribute the online survey link and they banned our account. So we decided to change it to hardcopy and apply it to University students. To get healthier descriptive data, the survey has been applied 1000 students from random faculties and random classes among 7 faculties at Gumushane University.

To understand the motives behind the nickname choices of teenager's, data about,

- What Email Services are they using?
- Which social networks are they using?
- Are they playing any online games?
- What nicknames are they using?
- Why did they choose that particular nick name?
- Is there an alternative nick name that they would prefer (but maybe couldn't get)

are gathered.

The survey has open ended questions and has been prepared by the researcher.

### **Material and Methods**

#### **Sample and Data Collection**

A nine open ended question survey has been developed by the researcher. The questions are chosen according to the aim of the study. Gumushane University is a recently established government university and have seven faculties. Some faculties like the Faculty of Tourism and faculty of communication have recently opened a few departments and do not have many students. Other faculties have relatively more students, and to reach a bigger sample, 1000 students from 3 faculties and 31 classes are chosen to participate at the study. The name of the faculties, sample sizes and ratios are shown in Table 1. Although the bigger the sample size is the more reliable the survey is, there is a 10 percent and 20 percent for small populations limit in literature (Arlı & Nazik, 2001, s.77)

	Population	Sample	Percentage
Faculty of Engineering	2923	453	15,50%
Faculty of Theology	880	265	30,11%
Faculty of Letters	608	282	46,38%
Total	4400	1000	22,73%

Table1. Populations and Sample size according to faculties

From each faculty some classes are randomly chosen and the survey has been applied. The participant departments on each faculty has been shown at Table 2, Table 3 and Table 4.

Department	Year	Day/Evening	Freq.
History	1	Evening	46
History	1	Day	34
History	2	Day	19
History	3	Day	25
Turkish Language and Literature	2	Evening	30
Turkish Language and Literature	2	Day	30
Turkish Language and Literature	3	Evening	43
Turkish Language and Literature	3	Day	36
Turkish Language and Literature	4	Day	19
<b>TOTAL</b>			<b>282</b>

Table 2. The Sample distribution of Faculty of Letters according to departments.

Only four departments in Faculty of Letters are active and two of them have fewer students because they have been recently opened. From this two departments, department of History and department of Turkish Language and Literature, a total of 282 students have been participated both from day and evening classes to this study.

Department	Year	Day/Evening	Freq.
Department of Teacher Training for the Religion and Ethics Courses in Primary Schools	3	Day	31
Department of Teacher Training for the Religion and Ethics Courses in Primary Schools	3	Evening	19
Department of Theology	Preparatory	Day	22
Department of Theology	1	Day	61
Department of Theology	2	Day	30
Department of Theology	2	Evening	30
Department of Theology	3	Day	41
Department of Theology	3	Evening	31
<b>TOTAL</b>			<b>265</b>

Table 3. The Sample distribution of Faculty of Divinity according to departments

Faculty of divinity has only two active departments and data from both departments a total of 265 students have been gathered. The sample includes both day and evening education students.



Department	Year	Evening/ Day	Freq.
Genetics and Bioengineering	1	Evening	41
Genetics and Bioengineering	2	Day	22
Genetics and Bioengineering	2	Evening	17
Geomatics Engineering	1	Day	36
Geomatics Engineering	1	Evening	35
Civil Engineering	1	Day	60
Civil Engineering	1	Evening	37
Mechanical Engineering	1	Evening	56
Mechanical Engineering	1	Day	55
Mathematics Engineering	1	Day	25
Mathematics Engineering	3	Day	21
Mathematics Engineering	4	Day	20
Mathematics Engineering	2	Day	19
Mathematics Engineering	4	Evening	9
<b>TOTAL</b>			<b>453</b>

Table4. The Sample distribution of Engineering and Natural Sciences Faculty according to departments.

The Faculty of Engineering and natural sciences have 9 active departments. 453 students from five departments both from evening and day education have been participated to this study.

### Data Analysis

The survey has been prepared at the beginning of 2016 and the data has been collected throughout March-April 2016. The data has been transferred to a spreadsheet program and quantitative analysis has been conducted with the help of research assistants. I want to thank Busra Kucukugurlu and Mustafa Resit Tavus for their efforts.

The codes and themes have been also prepared in the same spreadsheet program. After categorization the themes have been represented with frequency and percentage tables. Some examples have been also given for some themes.

Age	Freq.
N/A	80
<19	49
19	138
20	198
21	215
22	161
23	93
24+	66

Table 5. Age Distribution of participants'

Table 5 shows the Age distribution of participants'. The variance is small because all of the participants are university students. Most of them are on 19-22 year range. The total average of participants is 21,134 and the Standard Deviation is 1,41.

There were 538 male and 458 female students while 4 participants did not reply the question about their sex.

Email provider	Freq.
Gmail	768
Hotmail	692
Yandex	74
Other	29
Yahoo	27
TOTAL	1590

Table 6. Email preferences

Email is a widely used digital communication platform. Some students use more than one email provider. There are only 45 students that did not use email or that did not answer to this question. The most widely used e mail providers are by far G mail and Hotmail. The other email providers have only a small percentage.

We also asked participants whether they were playing online games. 157 of them replied positive. Actually this is a real low percentage (% 15,7) than expected.

Social Media	Freq.
Facebook	825
Instagram	764
Youtube	527
Google+	405
Twitter	393
Vine	141
Linked	37
Other	27
Pinterest	16
<b>TOTAL</b>	<b>3135</b>

Table 7. Social Media Preferences

Almost everybody is using Facebook and/or Instagram. Half of participants' are using YouTube and many are using Google+ and twitter. Other Social platforms are not used as much. Out of 1000 students 3135 different social media platforms are being used. That shows every student is using an average of three different social platforms, which is actually quite a lot.

Answer	Freq
YES	500
NO	406
N/A	94

Table 8. If they use the same nickname on every platform

We asked students if they were using the same nickname on every platform. The distribution is almost equal. Half of the students use same nickname on every platform, while half of them are using different nicknames.

Answer	Freq
YES	656
NO	281
N/A	63

Table 9. If they use their real name as a nick name

One of the most important questions on this survey is whether they were using their real names as a nickname. This survey has been established to understand what personal preferences would they have if they could choose a name for themselves. If they are not choosing any other names besides their given names, it would not be personal preferences. Because of this there is a sub sample of 281 people and from now on the coming tables should be interpreted according to this fact. From now on we will interpret the data with this 281 sub sample group.

Nickname	Freq
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N/A	683
Celebrity or hero	66
Not categorised	58
Own name or abbr.	55
English	49
No nickname	38
Hometown	31
<b>TOTAL</b>	<b>297</b>

Table 10. Their Nick name Preferences

We asked the participants about their nicknames and then categorized them. The most common preferences seem to be celebrity/hero names and their own names or its abbreviation. English phrases/Words are also a very common selection. Some participants prefer nicknames which are expressing their hometowns. This is especially important because the university students, which are probably for the first time away from their hometown, try to express their origin. This observation is also confirmed informally on the researchers 20 years academic life. 683 participants did not answer this question, 38 said they did not use nickname and the nicknames that were written varied so much 58 of them could not be categorized. Other answers include Informal expressions (10) sportive figures (12) religious phrases (6) Professional/job related terms (11) National/historical terms (11) etc.

Nickname	Freq
N/A	691
Celebrity or hero	73
Own name or abbr	55
Not categorised	50
No nickname	33
English	33
<b>TOTAL</b>	<b>244</b>

Table 11. Nickname Self definitions.

We asked participants how they would define their nicknames. This question may seem obsolete but sometimes an animal name may be chosen because it is the distinctive symbol of a sports team. Or a word may mean both a flower and may symbolize a loved one. So it is crucial to ask participants what this words symbolizes. Parallel to table 10, 73 participants said it's a symbolic for a hero / celebrity and 55 participants said its their names or the abbreviations of their names. English Word/Phrase usage is also very common (33).

Nickname	Freq
N/A	729
Non categorised	115
Celebrity/Hero	47
Hometown	22
<b>TOTAL</b>	<b>184</b>

Table 12. The reasoning of preferences

Another question was about the reasoning of the participants' nickname preferences. The question was prepared to identify the emotions and underlying reasons about their nickname preferences. Does the nick name make feel free? Or powerful? Or important? Or different or divergent? This would make a real scientific outcome for the main question of this study. But most of the participants replied as "because this is my favorite singer" or "because I'm from xxxx" or "Because I like xxxx very much" etc. This is far from revealing the underlying reasons of their nick name preferences. An interview could be more enlightening. The data and results can be seen on table 12.

Would you prefer other nick name??

Nickname	Freq
N/A	679
No Nickname	212
Prefer to have	89
Was already used	11
<b>TOTAL</b>	<b>312</b>

Table 13. Non taken nicknames

We asked the participants whether they would prefer any other nicknames? 679 of them did not replied (see table 9 explanation), While 212 of them said they wouldn't prefer any nickname. 11 said they tried but the nickname was already in use and only 89 said they would have if they could. The preferences are revealed at table 14.

Table 14 shows the dream nickname preferences of participants. As expected 432 did not reply to this question and 214 said they would not want any other nickname. 55 said they would use their own name or its abbreviation. English words/phrases, hometown symbols and celebrity/hero symbols are other most common answers.

Nickname	Freq
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N/A	432
No nickname	214
Non categorised	128
Name or abbrev.	55
English	31
Hometown	30
Celebrity/Hero	28
<b>TOTAL</b>	<b>486</b>

Table 14. The nickname preferences about their dream nicknames.

## Results and Conclusion

On education one of the most important factor is the target group. The more you know about the learners the better you can design teaching environments, materials etc. for them. Gathering information about the target group step is included on almost all educational design models.

The given names of our students tell not much about themselves, because it has not been chosen by themselves. But nicknames are different. They can represent their self-esteem.

1000 students from Gumushane University participated this study. Data has gathered with conventional pen paper method. Most of the participants use email. Average social media platforms used per participants are three. Most of the students do not play online games. They prefer their own names or its abbreviations as nickname. Further studies are needed to reveal underlying reasons of their nickname choices.

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## **Using Hot Spot Analysis and Comprehensive Grocery Store Locations to Analyze Food Store Accessibility, A GIS Approach to Demarcating Food Zones and Food Deserts**

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### **ABSTRACT**

Food deserts consist of areas in a city or region that are underserved by grocery stores that sell healthy foodstuff. The phenomena is most evident among US cities and to a lesser extent in other cities around the world. This paper argues that examining small grocery retailers is essential to understanding the prevalence of food deserts particularly among Canadian and European cities where small grocers play an instrumental role in providing healthy foodstuff. Further, this study uses a hot spot analysis procedure, which is based on advanced geographic information systems algorithms, to produce maps that show where potential food deserts might exist. Earlier studies suggest that the suburbanization of grocery stores in cities has contributed to the development of food deserts- disadvantaged areas with poor access to healthy, affordable food. When small and larger grocery stores are examined over space it is apparent that the notion of a food desert lessens. Further, it provides evidence of the important role that small grocers play in providing healthy food options to city residents. The principal conclusion of this study is that residents in Hamilton, Canada are adequately serviced by retail providers of food and that there is no food desert based on a comprehensive spatial understanding of food providers. Had conventional procedures for mapping food providers been employed a different finding would have surfaced.

Key Words: food, desert, Hamilton, Canada, store, grocery

### **INTRODUCTION**

Food deserts are areas of a city or region that have an absence of stores that sell a wide selection of healthy food options, such as fruit and vegetables. There is prevailing pressures on retailers and from a growing suburban population that necessitates supermarkets and grocery stores locate in areas that are suburban and predominantly accessible by car. The plights of these market pressures has led some to suggest that retailers and government are purposefully marginalizing segments of consumers. The distribution of stores may result in some neighbourhoods having lower accessibility to healthy foods than others.

Food deserts, grocery gaps, and food poverty are some of the terms being used to describe and explain inaccessibility to healthy food options and where healthy food options are limited on a geographical scale. (Mishkovsky, 2009; Gentile, 2008; Shaw, 2006; Reisig & Hobbiss, 2000; Wrigley, 2002). The concept is partly tied to the importance of quality, diversity, and affordability with respect to foodstuffs that are offered by stores. In locations where food deserts persist low-income, social deprivation, and/or limited mobility are two factors that have been found, compounded by the lack of nearby stores (Toronto Public Health, 2010; Kirkpatrick & Tarasuk, 2010). It is partly for these reasons that attention is being given to both the location and accessibility of foodstores in relation to local socioeconomic characteristics (Beaulac et al.,

2009; Larson & Gilliland, 2008; Apparicio, Cloutier & Shearmur, 2007; Reisig & Hobbiss, 2000; Wrigley, 2002).

What precipitates a food desert is sometimes difficult to identify, particularly since the matter is multifaceted. Not having easy access to foodstores leads to an inaccessibility to healthy food options and which in turn has implications on health outcomes, particularly for individuals that are economically disadvantaged. In fact, it has been found that accessibility to healthy food options leads to better health and better nutrition (Eisenhauer, 2001; Eckert & Shetty, 2011). While other socio-economic factors have also been found to have a role (Shaw 2006; Cummins & Macintyre, 2002; Pearson et al., 2005) a common theme that resurfaces is that when people do not have healthy diets there is a link to the existence of food deserts (Shaw 2006). While defining what is a food desert is still a matter of debate it is shown in this study that using hot spot analysis is a lucrative way of showing the phenomena using an alternate method.

Understanding food deserts can be made with the help of understanding demand and supply. In this paper, the matter of supply is the focus of study. For example, where food stores are located is important. In a perfect situation stores would be of equidistance apart and able to sufficiently serve an entire population or region. This of course is never the case, other than perhaps in central place theory. Because inequity is inevitable in this situation, this study chooses to examine the spatial distribution of, and accessibility to, food stores in Hamilton, Ontario, Canada. This city was chosen because it, like many Canadian cities, has characteristics of both European and American cities and lends nicely to understanding food deserts in a hybrid urban environment. The city also is mid-sized, of around 500,000 persons and more importantly it has a varied socioeconomic landscape (Smoyer-Tomic, et al., 2006). It is thought that Canada shares some similarities with both the US and UK, yet its geographic, demographic, political, and economic characteristics are unique and it might mean that with respect to food access, the patterns found may be distinctive (Smoyer-Tomic, et al., 2006). This paper is also unique because few studies examine stores of varied sizes, ranging from larger grocers to corner variety stores.

While there has been some recent studies that examine accessibility to healthy foods on a geographical scale (Wang, Tao, Qiu & Lu, 2016), the term food deserts has been used to describe environments where consumers lack access to affordable nutritious foods, which often happens in low-income areas with limited access to full service retail food outlets (Wang, Tao, Qiu & Lu, 2016). Food deserts have been identified as being located in both rural and urban areas in North America (Wang, Tao, Qiu & Lu, 2016). Both of these areas are constrained through population distribution and uneven food supply sources which reduces the regularity of healthy food availability (Lebel, et al. 2016). "For this case, people's functionings could be considered their aspirations for food procurement experiences that promote feelings of dignity, autonomy, and belonging within a broader consumer culture, and for cross-class parity and respectability more generally" (Bedore, 2014, pp 214). Food procurement is bound up with individual choice, desires and class status (Bedore, 2014). As a result, food desert conditions impair people's choices for foodstuff, narrow their experiences, and foster inequities in a community or region (Bedore, 2014).

Through the lens of ethnicity and culture, the understanding of food security can go beyond physical accessibility (Joassart-Marcelli, et al., 2017). It can be argued for example that food stores can fail to distinguish the unique needs of ethnically diverse communities. On the other hand, a food desert neighborhood may not be an attractive location for supermarkets or large grocery stores due to costs, such as, building and operating and the price of land or rent



being higher in food desert areas (Ploeg, 2010). In contrast, small grocery and convenience stores may locate in food desert areas but may not have the ability to support the space and equipment to maintain fresh and healthy food (Ploeg, 2010). There is also a possibility that some food stores and more specifically grocery chains are “redlining”. A practice where they choose not to locate in some parts of a city based on ethnic, low incomes or other socio-economic factors (Zhang & Ghosh, 2015). This has served as a possible reason why supermarkets have closed down and relocated to suburban areas (Zhang & Ghosh, 2015).

From an economic standpoint, it can be quite simple, healthy food is more expensive than less healthy food. Individuals with low income, tend to seek out foods with the lowest cost, and those foods are predominantly high in sugar and fat (Wright et al. 2016). It can be argued, food deserts exist and are more prevalent in disadvantaged areas (Gordon, et al. 2011). Food deserts are found to exist in low income communities which limits a person’s ability to access affordable foods. Also, it has been found that in a food desert there are higher prices in small groceries and convenience stores (Larsen & Gilliland, 2008).

Alternative modes of transportation, such as affordable auto or public transit, are important to whether individuals are able to shop for groceries and purchase large quantities (Strome, et al. 2016). Obtaining sufficient healthy and affordable food can be difficult to access without a private vehicle (Dutko et al. 2012). Moreover, one can argue that a lack of practical transportation poses as a definitive barrier to accessing affordable and nutritious food (Ploeg, 2010).

Efforts are being made to identify and targeting obstacles to accessing healthy foods in conjunction with pricing strategies and income support (Weatherspoon, et al. 2015). By furthering research, it will aid in better understanding food deserts and barriers to consumer to shop for healthy foods. Studying food deserts will be helpful to policy makers, urban planners, and other stakeholders to better understand the phenomena and in designing policies and programs intended to improve disparities in the provision of healthy food.

### ***Research Focus***

The research conducted in this paper will focus on examining whether disparities in access to food stores exist for individuals residing in different parts of the City of Hamilton, Ontario, Canada. This study uses proximity and distance as two measures to better understand food accessibility. Four levels of food stores are examined in this study to help bring clarity to mapping food accessibility. These four levels of food sources are a) Level One Stores: they are high-end supermarket stores and are usually chain operated and owned; b) Level Two Stores: they are discount food stores which are usually large in size and usually are chain-owned stores; c) Level Three Stores: they are locally-owned, and independently operated food store that can vary in size, but are usually smaller than Level One and Two stores, and; d) Level Four Stores: they are neighbourhood oriented establishments, such as convenience stores.

### **DATA AND METHODS**

This study examines the differences in accessibility that residents of different areas have to purchase groceries in the city of Hamilton, Ontario, Canada. The metropolitan area is located approximately 70 km west of the City of Toronto. The metro city of Hamilton's total population is 721,053 (Statistics Canada, 2011). To help identify if food deserts exist in the city data is analyzed based on accessibility to nearby grocers in the Hamilton metropolitan area at one four tiers of food stores. To help with this analysis data is analyzed for the different sizes of grocery stores that exist in a city. Unlike other studies on food deserts that primarily analyze larger grocers, this paper investigates smaller grocers as a way to understand if food deserts truly exist. To help in this regard a hot spot statistical-mapping procedure is employed.

A hot spot analysis is used to examine 'hot' and 'cold' spots of grocers in this study, specifically whether the clustering of food stores is present at any tier. Tier one and two large chain grocery stores have been grouped and analyzed together, and Tier Three and Tier Four stores separately. The hot spot analysis tool in ArcGIS identifies statistically significant spatial clusters of high (hot spots) and low (cold spots) using the Getis-Ord-Gi\* statistic. The 3 spatial clustering patterns possible are: hot spots, cold spots and random (no pattern). The hot spot analysis was conducted using a Fixed Distance Band to conceptualize the relationships found in this study.

Arc GIS (ESRI 2017) is used to conduct the hot spot analysis. ESRI, the company that produces Arc GIS, a software for conducting hot spot analysis, suggest that the "tool calculates the Getis-Ord Gi\* statistic (pronounced G-i-star) for each feature in a dataset. The resultant z-scores and p-values tell you where features with either high or low values cluster spatially. This tool works by looking at each feature within the context of neighboring features. To be a statistically significant hot spot, a feature will have a high value and be surrounded by other features with high values as well. This tool identifies statistically significant spatial clusters of high values (hot spots) and low values (cold spots). A high z-score and small p-value for a feature indicates a spatial clustering of high values. A low negative z-score and small p-value indicates a spatial clustering of low values. The higher (or lower) the z-score, the more intense the clustering. A z-score near zero indicates no apparent spatial clustering" (ESRI, 2017).

### **FINDINGS**

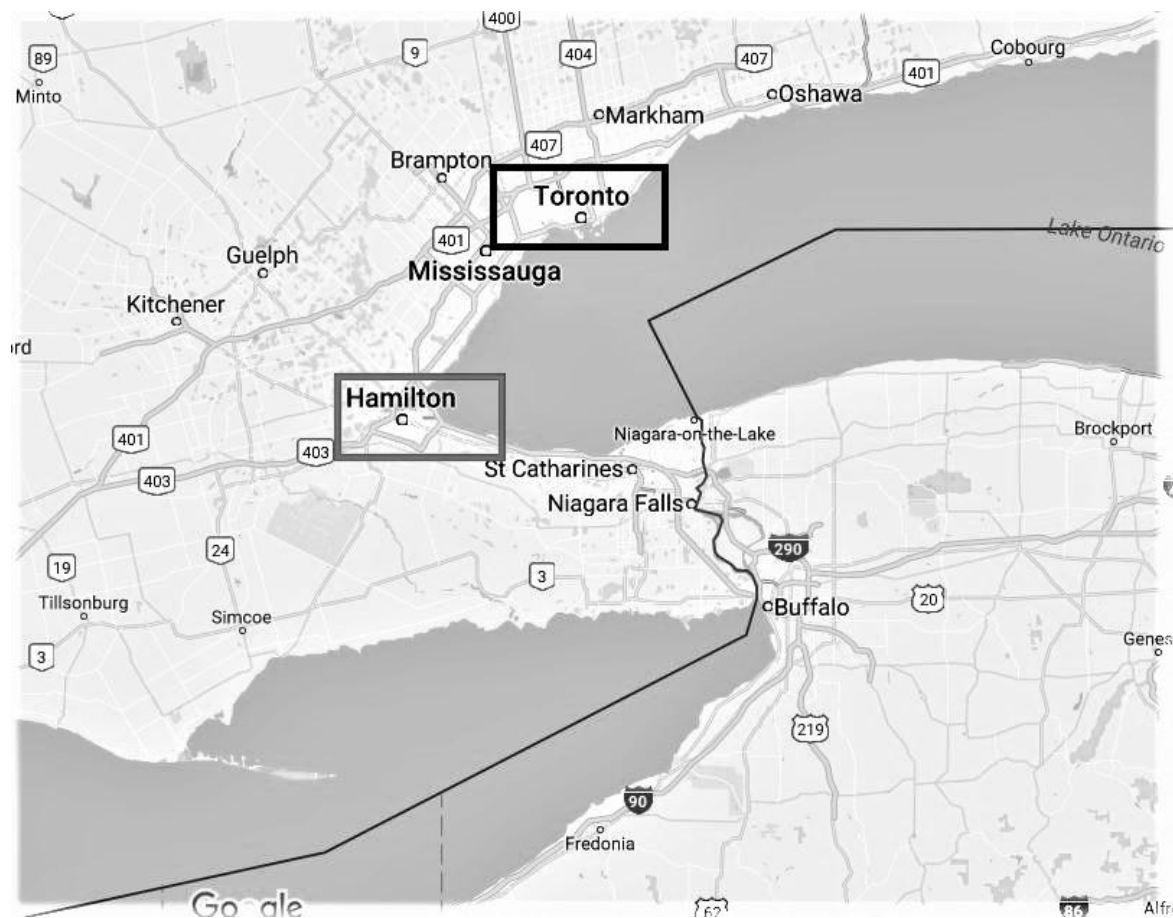
The city of Hamilton is located 40 kms southwest of Toronto, Canada (Figure 1). The city traditionally was a place of heavy manufacturing, but has successfully transitioned to a health services, education, and post-industrial economy. Between 2006 and 2011 the number of food

stores increased only very slightly (Table 1). Still, the city gained 7 Tier One high-end grocery stores and 8 Tier Three independently-owned food stores accounting for a positive change of 33% and 18%, respectively. At the same time there was a loss of 8 Tier Two discount type grocery stores and a loss of 5 Tier Four convenience and franchise stores, a 23.5% and 2.6% loss, respectively (Table 1). Because there were gains in the number of large grocery chain stores in the study area it is not anticipated that new food deserts would surface, particularly since there were also gains among independent grocery and convenience-type food stores. If anything, consumers probably had a shorter distance to travel from 2006 to 2011 to the nearest grocery store. Figure 2 shows the location of all stores in the study area by type and level of food service provided. In 2011 there was a high incidence of all types of grocery stores operating throughout the city (Figure 2). Still, it is found that smaller grocers are locating closer to the core of the city with larger grocers operating to a much greater extent in the suburbs (Figure 2).

**Table 1: Types of Stores in Study Area by Tier**

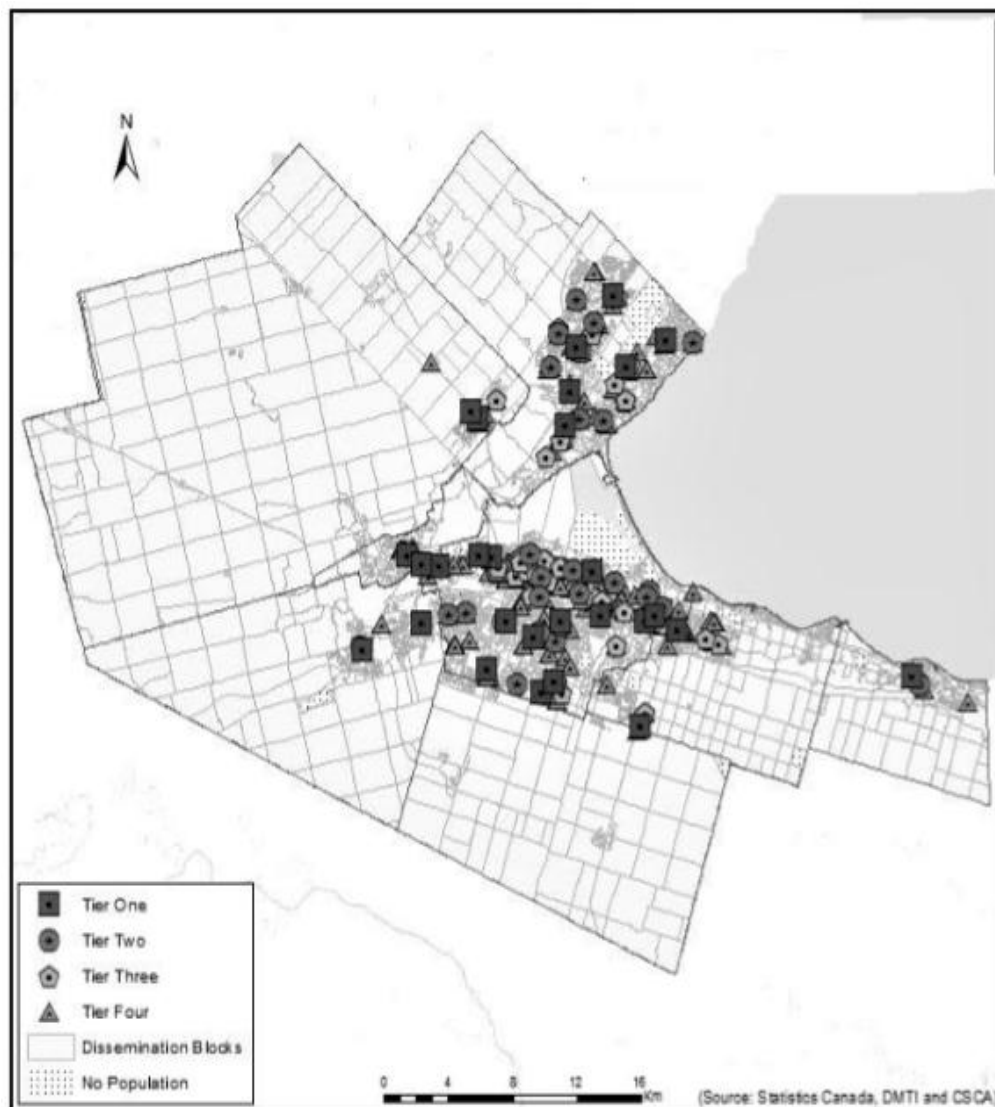
Store Type	2006	Total Share	2011	Total Share
Level 1 (high-end chain)	21	7.1%	28	9.4%
Level 2 (discount chain)	34	11.5%	26	8.7%
Level 3 (independents)	44	14.9%	52	17.4%
Level 4 (convenience)	197	66.5%	192	64.5%
<b>Number of Stores</b>	<b>296</b>	<b>100%</b>	<b>298</b>	<b>100%</b>

**Figure 1: Study Area: Hamilton, Ontario, Canada**



Source: Google Map, 2017

**Figure 2: Food Store Locations in Hamilton, Ontario by Level of Service, Ranging from Tier 1 (Large Grocery) To Tier 4 (Small Independent) Stores**



### *Hot Spot Analysis*

The findings of the hot spot analysis conducted on the 2011 store data indicate some degree of spatial clustering for Tiers One and Two chain grocery stores, Tier Three food stores and Tier Four convenience type stores. Although the large majority of store locations displayed a random pattern (no clustering), ‘hot spot’ areas of grocery retail are found to be more predominant than ‘cold spots’ (Figures 3-5).

For Tiers One and Two combined, 5 areas had z-scores that are significant at the 0.05 confidence level. Four areas in downtown Hamilton are classified as ‘hot spots’ where there was a significant chance (>95%) of encountering a higher than average number of Tier One or Tier Two stores (Tables 2 and 3). One suburban neighbourhood was classified as a ‘cold spot’ where there was a significant chance that a lower than average number of Tier One or Two stores are present (Figure 3); this area also had the lowest z-score value amongst all three tiers (Tables 3-4). At the Tier Three level, 12 areas all of which are located Downtown, had high z-scores significant at the 0.05 confidence level. In these ‘hot spots’ there was a statistically significant chance of having a greater than average number of Tier Three stores (Figure 4). The Tier Four

level showed 29 areas with significant z-scores. There are 28 ‘hot spots’ located in downtown Hamilton where there is a significant chance of finding a higher than average number of convenience stores. In the suburban, 1 ‘cold spot’ is identified where fewer than average Tier Four stores are likely to be found (Figure 5). Of all tiers, Tier Four had the highest z-score value (Tables 3-4). This is because this tier accounts for the largest number of stores, many of which are clustered to downtown Hamilton. These findings further support the notion that person residing in the Hamilton CMA have adequate access to food retailers at each of the tiers (Figures 3-5). Because there are few cold spots shown in blue in Figures 3-5 there is ample evidence that the notion of food deserts may not be as apparent when a variety of food sources and stores are examined. When observing the hot spot analysis of just larger grocers it is apparent that much of the city is well serviced. Surprisingly, the downtown core has ample accessibility to larger grocers as apparent by the red or hot spots in Figure 3. If the same analyses were conducted for most American cities the opposite would likely occur, with the downtown core having many cold spots. Interestingly, one has to look at the outer suburbs to find any cold spots in Figure 3. It seems that as population density decreases in an area the propensity for food deserts to surface will increase. When observing small grocers, a group that can easily be overlooked, there are in fact no cold spots or food deserts in the analyses (Figure 4). The inclusion of small, independent grocers in a food desert study, which can be harder to facilitate, because they sometimes have to be found by ground truthing, are seen as vital to understanding the incidence, size, and propensity of food deserts. In this study, these store types are found to play an important role in the core of the city in that they are vital food places. Small convenience stores are not thought to be ideal places for consumers to shop for healthy foodstuff. Nonetheless, such stores are arguably getting better at providing some healthy food options, such as fresh fruit and some types of vegetables. In Hamilton there seem to be adequate locations of convenience type stores (Figure 5). As with the larger grocers, the few poorly serviced areas that do exist are situated in the outer suburbs. The better serviced areas that are being provided by convenience stores are situated in the core of the city.

**Table 2: Hot Spot Analysis Summary Statistics**

Tier	Minimum Z-Score	Maximum Z-Score	Mean Z-Score	Standard Deviation
Tiers One and Two (chain grocery stores)	-2.014	2.745	-0.086	1.188
Tier Three (independents)	-1.157	2.676	0.853	1.274
Tier Four (convenience)	-1.978	3.000	0.500	1.286

**Table 3: Number of Hot Spots and Cold Spots by Area**

Tier	Hamilton Hot-Spots	Hamilton Cold-Spots	Ancaster Hot-Spots	Ancaster Cold-Spots
Tiers One and Two (chain grocery stores)	4	0	0	1
Tier Three (independents)	12	0	0	0

Tier Four (convenience)	28	0	0	1
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**Figure 3: Hot Spot Analysis for Large Grocery Stores**

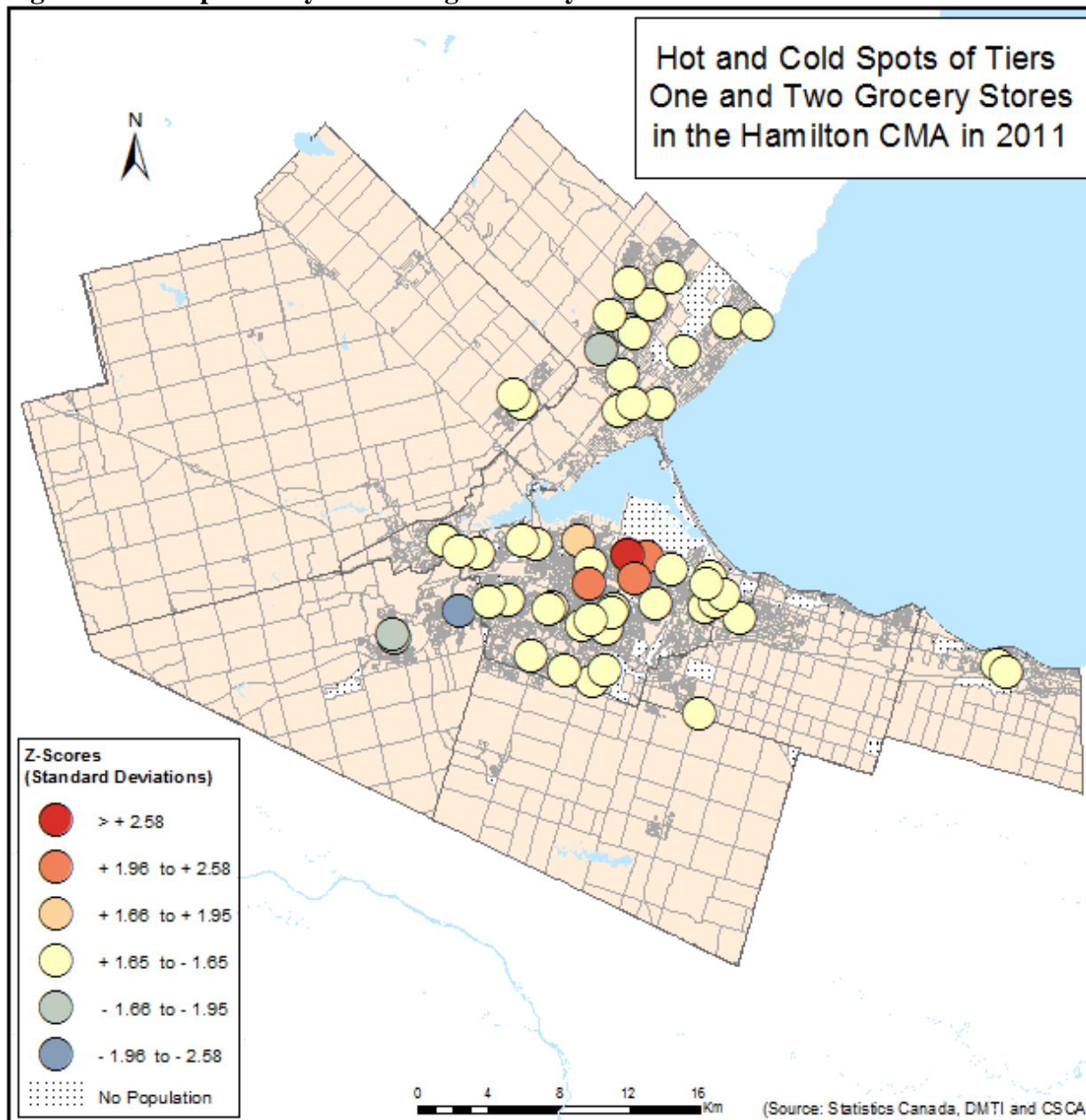
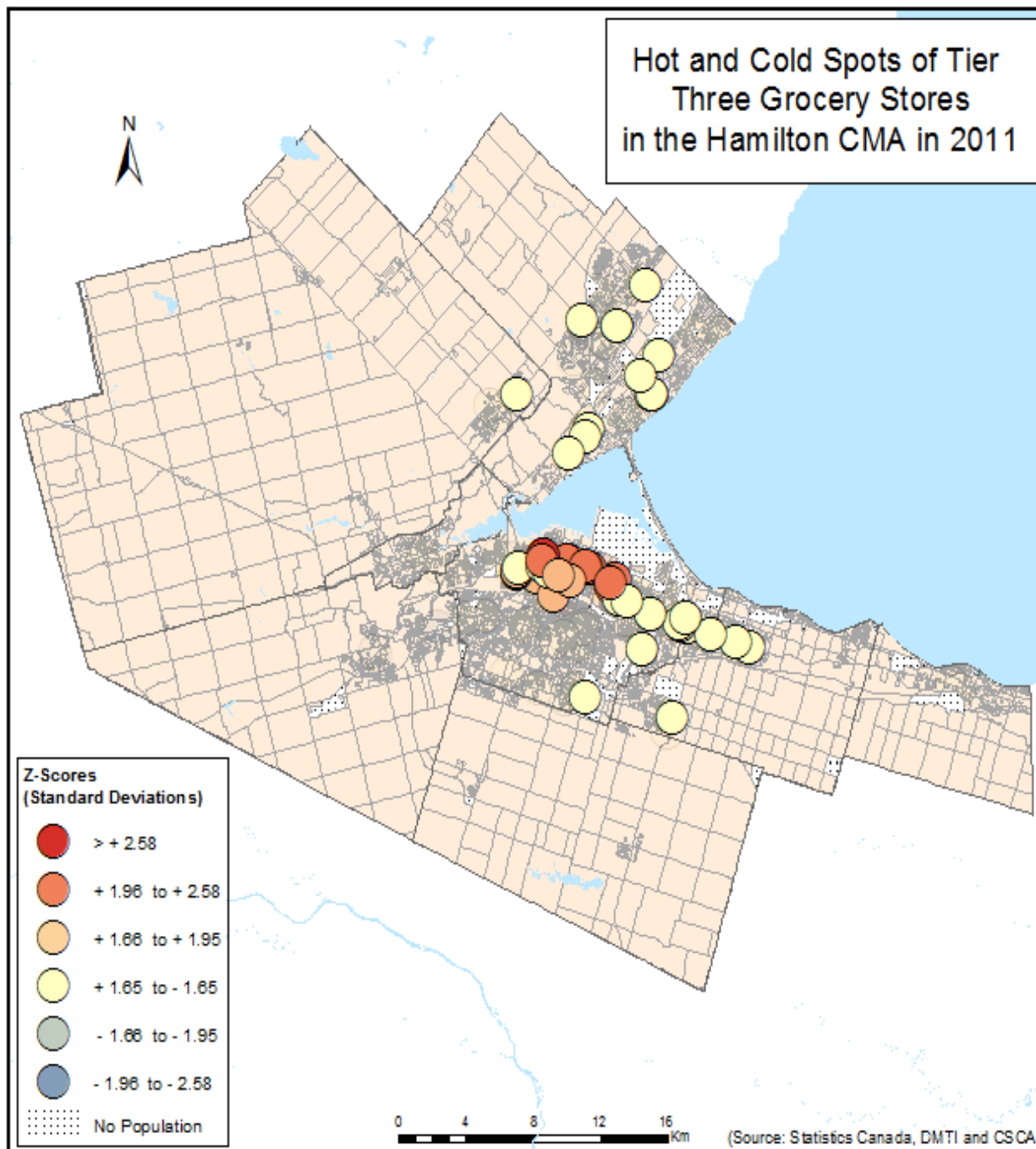
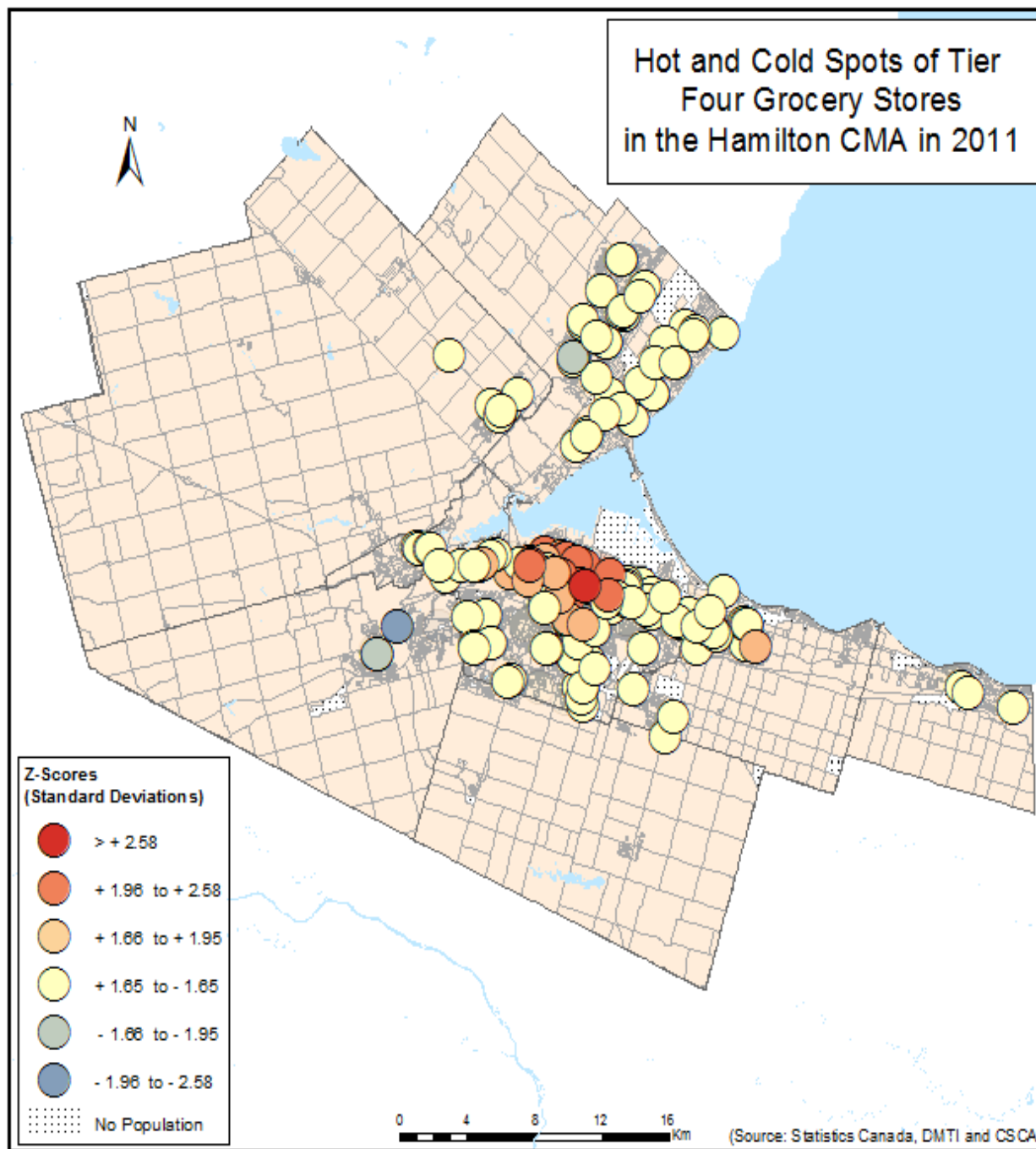


Figure 4: Hot Spot Analysis for Small Grocery Stores





**Figure 5: Hot Spot Analysis for Small Convenience Stores**



## CONCLUSION

Using a hot spot analysis along with a heightened method for better classifying food stores has produced some interesting findings with respect to the geography of food accessibility in the city of Hamilton, Ontario, Canada. By classifying stores into one of four levels or tiers one can better define the extent and depth of food deserts in an urban environment. It was found for example that when one examines foods stores that are small and independently-owned in conjunction with

stores that are large and chained-owned, that the geographic boundaries of food deserts is drastically reshaped and in this case reduce in areal extent. Further, we found a higher incidence of small food store than expected in the study area. This contributed to a reduction in the incidence of food deserts in the study area. For the most part it was found that there is adequate access to foodstuff in the city of Hamilton. This outcome was found because small food stores were geocoded and mapped in the study. Ultimately, there were few gaps found in Hamilton's spatial foodscape when all four tiers of food stores were included for analysis. This finding would have differed had only large and medium-sized grocers been analyzed.

The hot spot analysis indicated that within the Hamilton CMA, only one area in the suburb had cold spots of grocery retail. Downtown Hamilton had many hot spot areas and the rest of the city did not have unusual clusters of food store. Fortunately, the poorer neighbourhoods that are located in downtown Hamilton are found to be 'hot spots' or locations where local residents have multiple options to grocery shop. .

The high level of accessibility found in the core of the city can be attributed to Tier Three and Tier Four stores filling in the gaps where Tier One and Two stores were found to be lacking, spatially.

This study shows that it is important to include local, independent neighbourhood stores as vital players in the grocery retail landscape of cities. It seems that as population density decreases in an area the propensity for food deserts to surface will increase. If poor diet is a public policy concern, it may be that people are either choosing to shop at Tier One and Tier Two stores but do not purchase healthy foodstuff or they are choosing to purchase the majority of their food from convenience stores. Therefore, more government action is necessary to better educate the public on the importance of healthy diet and lifestyle choices. Furthermore, cities and governments should foster policies that encourage and support local independent providers of grocery retail.

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## Immigration, Women and Health: Categories of Analysis on the Same Reality

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### Abstract

Immigration, women and health, are words that in the scenery of migrations and social relationships, having different meanings. They are categories and units of analysis of the same social reality: human mobility. Revealing their meanings helps to understand this phenomenon from the Law and Public Health Area. **Objective:** The objective of this work is to expose some elements of analysis, that are the result of a research in ethno-health in immigrants in Spain (1), that could give some socio-cultural representations of the meaning of being an immigrant, a woman immigrant, and the effects on health and family composition. It is a qualitative approach. **Results:** Thinking of immigration have two-ways of approach: instrumental, and humanistic. The main health problems in immigrant women are psychosocial and emotional ones. These are related to "mixed feelings" and negative emotional states, produced by missing rights, lack of family, and the fight to achieve better life conditions, the reunification and family re-composition.

**Keywords:** Migration, Woman Health, Latin-American migrants, Spain.

### Introduction

*“As a bird, looking for food, I went down to Sevilla; another stomach in escaping, It is not a brain, as at the beginning the colombian traveled to abroad (...), Almost everybody traveled looking for a better life, life that could be represented in euros. A cold sign to represent migration: euros, euros and euros. I just landed, and there is an amazing group of colors that I see, green, yellow, as an sevillan range of colors, that I see in the churches, towers, and monuments that seems greet me (...)*

*A lot of elderly- now I understand the “Old world”- They are alone, or in some cases with the dog or the cane(...) Tired and sad, they go to the bar to taste the jam and drink a beer. All of these remember me my childhood, with colonial houses, Spanish last names...*

*In the afternoon I go around, and I can see a lot of migrants, colombian, bolivian, ecuatorian, maroccan and venezuelan, take the rich children to the park, looking tired and sad. When I talk with them, they tell that they leave their children, and now they are taking care of other children that not are theirs. This is also my feel, because I am a mother of a boy of fifteen, and I could not bring him. One part of me is in Colombia...”*  
(Part of the story: *La Migración, Una Frontera Artificial*. Luz Stella Restrepo Vélez. Inmigrante colombiana. Artista plástica. Sevilla, España. Marzo 2007; Migration, An Artificial Burder.)

Immigration, women and health, are words that in the scenery of migrations and social relationships, having different meanings. They are categories and units of analysis of the same social reality: human mobility. It is very relevant to obtain a thorough understanding of this categories using a participatory methodological approach, in order to invites communities to identify and define their own problems and make their analysis and the strategies to deal with them.

## **Objective**

The objective of this work is to expose some elements of analysis, that are the result of a research in ethno-health in immigrants in Spain (1), that could give some socio-cultural representations of the meaning of being an immigrant, a woman immigrant, and the effects on heath and family composition.

## **Methodology**

This study was result of the project for migrants coordinated by Pontificia Universidad Javeriana of Bogota, Colombia and la Hispalense of Sevilla, Spain (1), during one year of field work.

It uses qualitative methodology as an ethnography approach. Participants were Latinamerican women from Cuba, Mexico, Chile, Ecuador, Peru and Colombia who live in Sevilla, Spain. It uses participatory tools in order to invites communities to identify and define their own problems and make their analysis and the strategies to deal with them, seen as an ongoing process of listening-dialogue action.

The information was obtained through in 10 in-deep interviews, 7 focus groups, 27 workshops, 3 domestic visits and participant observation. Sample size and data collection was until saturation point. Information was analyzed and emerged categories were found. All participants firmed inform consent.

## **Results**

### **1. First category, ¿What is migration?**

The pure definition is “The action to immigrate”. “It is for natural citizens of one country to arrive and establish themselves in another county” (2). From this point of view, it does not include the causes, effects, shapes, place of origin, or time. Now let us look at the different concepts that arise from the question ¿What does immigration mean to you? (3) The answers differ in two conceptual groups.

#### **1.1 First conceptual group:**

These opinions emerge frequently and have significance in the qualitative methods. These general concepts match with those of the Spanish society at different levels, such as daily and public ones.

“It is a process in which the place of origin is abandoned looking for a better life. It is because of economic, social and political reasons”. “Migration includes a very important social meaning: the mobilization of people who go to another country because of different causes, not precisely for traveling, but to obtain a better life than they had before”. “It is to abandon my country looking for better personal conditions, and a better economy, leaving behind my whole life”. “It is a phenomenon that could be inside the same country, because of social and economic problems, and armed conflict. The human being is looking for wellness and to be recognized as a person”

### **1.2 Second conceptual group:**

These are less common. They give different elements and analysis possibilities.

“A human phenomenon engaged by different causes but the common objective is: something specific to the person – whether voluntary or forced-. The person could perceive this movement to be positive or negative”. “It is to travel to another place different from where you were born, which means sometimes leaving ones culture and family”. “It is a very important change for the person who suffers, it is a point in his or her life. It is a very important decision that comes from different motivations, some economic or political, looking for a better life”. “It needs an adaptation process to the new place, and it is the same for those who were there and now receive new people, and new situations”. “It is a process where the person has a role in a different place, in a new social framework, new labor environment and a big distance from family, culture and friends. All of this produce an internal change in the person”. “Migration is plurality, color and wealth”. “It is a human need, sometimes because of whim, because of cultural need, because of survival”. “It is an international phenomena that bring about conflict for those who don’t understand the causes”.

Other women think that immigration is “a change of place that permits us to know another cultures”. To change, to move, from the place we come from and live in another one where will live”. “To find another place to live, better than the one we have, but remembering who we are, and our culture”. “I don’t feel like an immigrant because of my point of view as a native “Mapuche”, I think that the land of those who invaded mine, is also my land”. (Women from 30-49 years, Argentinian, Rumanian, Algerian, Chilean, Colombian. Seville, Spain 2007).

### **1.3 Conceptual Analysis:**

The concepts of the first block are focused on economics and the quality of life, such as the causes and components-almost unique- of the population movement. Although these aspects show part of the reality, they just show a few of the immigration causes. They show imaginary views of the power and the media about migration, some of whom say “They are poor and ignorant. They do not know anything, do not understand, only are looking for money”. “They come to affected us, they bring insecurity for the community, they want to appropriate the resources, take away our jobs, our health security and bringing violence. They are dangerous. Why are they disturbing us?” In general, they are considered to be people with problems who are different and who need to adapt to the environment of the receptor country. They are rare and strange, and usually they are not good people. They are dark skinned, black. They speak differently, their behavior is different...” (4)

From this point of view, they are unknown in their history and culture. They deny their capability TO BE, to think, to feel, to do, and to be relate to others. In many speeches they are referred to articles and adjectives used to express indifference and contempt: “the, they, a, those, blacks, moros, migrants”. This can leave out their history, their names, and their identity as human beings. They suffer a depersonalization making them vulnerable to other contexts.

“Identity is a subjective dimension of social actors located between liberty and determinism”. It means, social actors are autonomous, engaged in processes of communication and interactions.(5)

In this context and taking into account this meaning, the immigrant is considered a piece of the economic and politic system, which transform him or her in to a cheap worker, an instrument. It generates a constant process affecting his or her identity daily. In consequence, the networks that are carrying their culture have been broken making the relationships with others worse.

“From the systemic perspective, the instrumental and strategic actions are fundamental to preserving the system. World and life are linked with cultural reproductive phenomena, social integration, and socialization, for whom interaction and communication are fundamental (...) Functionalism justifies the instrumental and strategic action, as well as the colonization of the world of life (6).

In the second conceptual block, there are included some complex elements of analysis such as human needs, nomadism and the finding of the BEING in any destination. They perceive migration as a decision and a changing process, with some ruptures, uprooting, de-contextualization and re-contextualization. It means plurality, wealthy, color, inflexion, the continuity of life. These concepts recognize and include the OTHER such persons with differences. All have the possibility to be considered citizen with rights.

As the author of the story, there are many who in their conceptualization of immigration agree with the dictionary and statistics, but in their senses and symbolic representations vindicate their essence as HUMAN BEINGS with an origin and culture. They are aware of their identity. They know that they have a name, last name, family, community, culture and land. They have a heritage that is all the knowledge, tradition, values, feelings, abilities that they have acquired in their lives and these do not disappear when they change their place.

The majority are recognized as social subjects. For this reason, migration is only a challenge, the continuity of life. The reasons or the causes are the excuse to look for different worlds and new experiences. This is the opportunity to go to the “OTHER” who can serve as a mirror, where they can look at them face to face, as different human beings. In this case, migration is a right, a possibility of dialogue, development, growing up and human change.

## **2. Second category: migrating women and their relation to health.**

*“I have been some months here in Spain and I don’t know what we think and what happens to us, as migrants: uprooting, no comprehension, the obligation to assume different roles or jobs we never had before. The dream and the possibility to make a different life are disappearing. Every day we need to work harder, in different areas and in different places if we want to overcome. I am resilient and I try to think that it is for a moment. I have a change of jobs: I have tried in house cleaning, taking care of children, working in bars, as a cook or as assistant to the*



*cook, and when I have a little of time I work as a volunteer in a Native Association. The Association tries to preserve the tradition and culture of the youth from the Andes region. It permits me strengthen my social and cultural life as part of my purpose as a migrant...”* (Second part of the story: *Migration, an artificial border*. Luz Stella Restrepo Velez)

In the research few men participated in spite of the huge convocatory. They considered that “Health and feelings are women’s topics”. We will share some ideas about what the family regrouping and recomposition for migrant women represent and mean in the Spanish context. These two aspects affect their health and wellbeing.

## 2.1 Some starting points

Time ago those who migrated were usually men, because of the provision for the family. Nowadays, because of industrialization, modernization, urbanization and the inclusion of women in the workforce, they need to look for provision. Added to this, is the poverty and inequity lived in the original countries, and the need of receptor countries where working women change the patterns.

Women in their new role as providers from a distance, have to support a double burden. They, in their own countries worked and supported their families in the economic part, but now, they have a different context, without their families, making their lives difficult and stressed. They feel unhappy, lonely, unable, and frustrated.

*“There I arrived from work and I could be with my children, helping them to do their homework, or taking care of them if they were sick. During weekends we went to have an ice cream. We took care of their clothes, their friends, their problems... We were a family. Now at a distance and by telephone, you cannot do it. Here, you arrive from work and are alone. Thinking of them. ¿How are they? ¿How is the big family?, ¿Es the money I send them enough? Or do they just lie me not to worry? It is very hard not to have my children here. It is a permanent worry”.* (7)  
Those are the thoughts of different migrant women from different countries.

*“We are not there, and our children became rebels, some fall into vices, because they grow up without limits. They do not obey the grandmothers or aunts. Taking care of them by phone is impossible”* They feel that *“To be a mother, wife or daughter in the distance is to lose all the value of the family. We are Euros, only Euros for them”* (8)

The stress of losing their children, and the feeling of being only “Euros” affects them greatly, and pushes them to send even more of their earnings making their quality of life worse.

*“If we send them a good amount of Euros monthly, the family cannot say anything. You are providing. You are supporting the children and the husband, and even the person who takes care of them. So, they cannot say anything about leaving them”* (9)

For women, education and family care have a huge value as traditional families who are Latin-American. In consequence, the absence of the mother for the family, and her role and responsibilities and duties change all the meanings and perceptions of the family, and the roles of women and men. During this process of re-signification of these categories, migrant people have a change in terms of less self perception, self esteem and personal integrity. Most of them say that *“they feel sad, unmotivated, and with low self perception”*.

“Feelings that we have as migrants, are melancholy because of our families, sadness, lonely, frustration, love, a decrease of the self potential, non understanding, hatred, uncertainty, revenge, rage, isolation, expectations. Many of them feel failure, have problems of self-esteem, fears, suffering and identity difficulties. They also have nutrition, environment and schedule problems. It is a “cultural shock”: “It is real hard for me. I cannot do the things I know and I want to do”. There is an absence of support, family nets and friends. Related to health, in the biological sense, we have anxiety, depression, sadness, change of humor, headaches, and sleep problems...” “Happiness, hope, satisfaction and tranquility arrive when we attain a job contract, or the legal documents, or the family”. (10)

When they travel to visit their families, some of them find that the money they sent to “Improve their life conditions and satisfy their families”, did not attain the objective they thought. Most of the money was spent to throw parties or to buy special toys, or cell phones, to demonstrate to the big family and society that they are proud to have the mother in Europe. It is a way of changing a poor image of the mother. Some of the youth, especially of the poor families, spend the money on parties, alcohol or drugs. At the same time, other family members could have profit from the money too.

The frustration of these women increases when some of them find that “the money we sent has changed them into people who don’t want to work, lazy people. They just wait for the time the money is going to come, every month”. (11)

## **2.2. Family regrouping and rearrangement**

Normally, the right to family regrouping is defended especially by women. But this is a long and even failing process because of the bureaucratic barriers of the Spanish legislation. (Article 31.3, Organic Law 2/2009) (12) reasons why many of them leave the process, or why even if they try, they cannot fulfill the requirements and conditions required.

For this reason, negotiation, linked with the absence of legal documents that permit them to work, means a big responsibility and many feelings, which affect them physically, mentally and socially. The idea that they leave their children in their countries burdens them with sadness. It happens even if they leave their countries do help their children.

*“I came to Spain because of my children and my family. I had the hope and the dream to earn money and improve their living conditions, giving them a better future... the one I never had, but I feel bad, because I am not with them, I left them”. (13)*

This situation brings another contradiction, they cannot be with their children, but if they go back to them, they cannot give them a “better future”. The majority of them decide to remain than “go back with empty hands”. At least, they can help the family economically as “*providers from a distance*”. It was the counterpart that they offered to go out and other family members would take care of their children.

When they finally achieved the family regrouping, they needed to face new challenges and problems, as a result of the transformation that they have suffered, and their families too, with

this migration process, intercultural change and the future of the family that also affects their lives and their health.

As a dynamic unit, the original family has suffered changes that the women did not participate in. It produces a bad feeling in them. At the same time with the years, they preserve the last image of the family they left as a “picture”, in an eternal present that they cannot change, because of the distance. For this reason, when they travel to their countries or when the family arrives to Spain, it is very difficult to adjust to each other. All of them have changed and it is a surprise.

A lot of women, because of their intercultural experience and in their new role as migrant women in Spain, they have unlearned, relearned and learned other knowledge, values, skills, attitudes, and new forms of relationships that make them different. But their families at the same time have changed. In addition, there is the process of adaptation to the family when they arrive in Spain. They come with plenty of expectations, with a misconception of the mother who takes care of them, with a lot of time, but they realize that many of these things have changed.

The women do not have time to be with them or to care for them as before. With the family regrouping, they intensify their time at work in order to have more money to supply the family needs. All the fatigue and the routine, with this new life style, with the absence of supporting nets and all the re-contextualization process, just give them time to go on, working. (14) They cannot be with their children and take care of them in this adaptation process, living through this difficult time as their mothers did. Some policies and laws related to health and social inclusion for migrants in Spain, have many gaps in the psycho-social attention. This is the first need in the process of adaptation to the new environment.

Many of them complain of losing their authority as mothers and wives, and they feel that they have lost the love and respect of their children. “They do not obey, they want to be like the Spanish, and they want to imitate them, even in the way they treat their parents. We don’t know what can we do” (15)

Many of their sons and daughter, the women left when they were children, arrive as adolescents, in the process of developing on identity, and all the confrontation with authority, hierarchy, roles, image, etc. All of these, add together with the changes because of the lack of the mother and the new representation of women and the mother. In Spain, this confrontation is bigger, because of the different context and culture. There are many socio-cultural factors that they do not understand, and they are looking for the acceptance and social inclusion. It increases the educational role of the mother, because they are also in the process of adaptation. Their time of work doesn’t permit them to be with their children, and all the feelings of blame do not permit them to have authority or respect. Another thing is that the reunion of the family after many years is the opportunity to demonstrate that they can respond, otherwise they will feel frustrated again.

The same process is lived by their spouses. They arrive with many expectations that they face according to their new circumstances. When they arrive to Spain, they suffer confrontations in their identity, daily life, and relationships that affect them seriously. The concept of family they

have had, and the concept they find, are different. They need to accept the idea that the woman is the person who works, at least while they find a job. The woman, the one who makes the decisions, is not at home, and the man needs to do all the homework and clean the house. This breaks the manly self-image he has had which has brought him his self-esteem. This also affects the women because of family conflicts, bringing them sadness, frustration, and health problems. Some of them confirm that the construction of new project of life is also affected.

### 3. “The migrants are healthy and here they became ill”

The principal problems of health that women have are “depression, anxiety, Ulysses syndrome, lack of documentation (which involves identity, rights, family regrouping, recognition, citizenship, uprooting, etc.), cultural maladjustment, high incidence of sexual transmitted diseases and abortion (in young women, especially Ecuadorian and Colombian), high demand for pediatrics, exaggeration in their care of children because of the promotion of health programs for children in Latin America, anxiety of mothers, loneliness, confusion with the value of currency, digestive problems, dermatological problems, back pain, allergies, and flu. Categorizing all of these by severity, magnitude, trend, and vulnerability, the most important are depression, anxiety, Ulysses syndrome and lack of documentation. (16)

The etiology and causes from the point of view of the studied migrants are cold weather, humidity, radical changes in the weather, envy of others, bad energy, bad luck, and feelings of guilt. (17) These last items have an important value for many women. When they became ill, they accept their condition and don't visit the health services, even when they have access, because they consider that “*they deserve that illness because they have left their families. They didn't come to Spain to become ill, but to earn money to help their families. Many of them deny the illness, because they fear losing their jobs.*” (18)

Other etiologies that appear are related to feelings and ruptures in relationships. First: privations (broken hearts), soul status. Second: mind--emotional status (time, place and person). And third: work and job conditions. The first two etiologies are related to the change of roles and family structure. On the other hand, there are a lot of feelings because of the condition of the new providers as well as missing mothers and wives. The third etiology is maybe the most important one: the changes produced by the work they do in conception, representation, sense, and how to manage time, place and person. The alterations of these units affect the *identity* of the subject who is the one who links all the units into one category, and represents the BEING in their individuality and collectivity. This unit in a new context needs the ability to communicate, and integrate into society. All this process changes the identity of the person, and all the re-adjustments that need to be made in order to fix the new context, take time and effort, causing stress, anxiety, depression, damage in their self-esteem, affecting their well-being and their bio-psycho-social-cultural equilibrium.

Many of the testimonies bring to light the fact that the migrant women do not go very often to health services, even though “there is a feminization of the health system use, especially for Latin American women. They go to the appointments for their children, family planning, abortions, and communicable diseases. They also ask about back pain, dermatitis, allergies, headaches, and nutritional problems, in addition to their loneliness and depression. There is also somatization, because of the lack of family networking and support, things that are shared with the Spanish elderly. They have a rupture with their origin, lack of self-esteem, changes in their

social environment and environment itself. There is a 'Faustian deal', Ostentation deal, changing life for money. It is really important to understand that the emotional problem of migration mourning is more important than the physical problem. They also have communication barriers because of cultural differences and their educational levels. Another thing is the lack of health personnel to help them. One doctor must attend seventy patients in one turn." (19) The feminine appointments are explained by the fact that the majority of the women go to health services because of their children. They are in a second place; they don't think about themselves or their well-being.

## Discussion

The concepts and ideas about migration are focused on economics and based on commiseration, segregation, mistrust, and fear. They omit the categories of the subject such as persons and social actors. These are exclusive, instrumental, mercantilist, and charitable symbolic representations. These produce discrimination, racism, xenophobia in the receptor society making acceptance worse.

The concept of migration explained as "continuity of life as a decision and a right" is a humanistic and inclusive concept. It is necessary to recognize the migrant as a subject with differences and similarities, with history, knowledge, abilities, values, feelings, emotions and different interchanges possibilities. They are citizenships with rights.

The new production systems and capitalism impose on women the new role as provider from afar. This role is very important in the productive system because of the cheaper work. For the migrant women, it is a big responsibility. The women from a distance have a social, emotional, and psychological burden in their role as women, mothers and wives.

The transformation suffered by the family unit, and the migration of women -- the new distribution of roles, responsibilities and adaptation -- bring other family types and produce big changes in their identity, daily life and relationships.

Leaving the original places -- forced or voluntary -- for different reasons, is a traumatic experience that breaks the physical, psychological, emotional, social and cultural well-being of the person and the family. For this reason, it must be faced as a human rights, public health and social development problem.

The principal problems in health for migrant women are the psychological and affective ones. These problems are related to the feelings and negative emotions produced by the absence of the family, the fight to obtain family regrouping, adaptation, the lack of rights and networking, support and the bad conditions in which they live.

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## **DIALOGIC APPROACH IN TEACHING**

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### **ABSTRACT**

In a dialogic approach teachers encourage students to exemplify, predict, interpret, revise, explain and freely express informal reasoning on an issue. As well, dialogic approaches motivate teacher and students to work together and construct knowledge in a friendly environment. The key purpose of the present research was to examine the views of teacher's Dialogic approach in teaching. The main objectives of the study were (i) To find out the current practices of dialogic approach in teaching in (ii) To investigate the teacher's perception regarding dialogic teaching approach in teaching. The current study was descriptive and survey type by. Questionnaire was used as research tool. Researcher personally visited and collect the data. SPSS was used in data analysis process, percentage and frequencies was used in data description. All the data was presented in the form of tables as well as figures.

**Keywords:** Classroom dialogue, dialogic teaching, Approach, classroom discourse

### **INTRODUCTION**

Exploratory talk, argumentation and questioning are different types of classroom talks which are termed as the dialogic interactions. This structure distinguishes the typical transmission modes of teaching from classroom communication where students are given the lack of restrictions. They give examples, explain, compare, organize and logic during discussion in the class room. Communications when the students pose questions, remark on ideas present in teaching, clarify and state points of view, and think about the problem are the dialogic interactions. Teachers support the students where needed and students take initiatives and able to use talk to provide continuity and make sure reciprocity.

In traditional teaching method, the teachers plan about the teaching and learning, then transmit the information to the learners as well as lastly, the learners are assessed to the knowledge (Wells



& Arauz 2006). This teaching approach focus on memorization rather than dialogical interaction and co-construction of knowledge, in addition its ineffectiveness it is actually an uninteresting method of learning for a lot of students. In contrast of this traditional (lecture) style of teaching, real teaching and learning are done by dialogue as shared process of teacher and students. Real teaching is completed by collectively teacher and students together and an imperative element of teaching is that it is a mutual process between teacher and students (Game & Metcalfe 2009). In the Traditional way students are not motivated to higher order critical thinking and high level of learning, so that is criticized as a teaching method (Black, 2005).

In some understandings there seems to be a theoretical disagreement between the socio-cultural and dialogic views of learning. The socio-cultural way of learning can also be viewed as similar to “dialectic” learning, in which the objective of the learners is to develop knowledge collaboratively. In dialogic approach different viewpoints are constructed jointly without fear of being correct or incorrect (Moate 2011). In conversation, daily and scientific influences are equally present, thus enabling real creativeness, thoughts and problem solving, which are basic to the improvement of scientific knowledge.

The socio-cultural perception on teaching and learning highlights the significance of learning within a social context and the potentiality of talk to facilitate the co-construction of knowledge (Vygotsky 1978). Verbal communication has a deep effect on the growth of thinking and is an area of rising attention within educational research. The importance on developing way of thinking and communication skills solve the problems of the prospective society: in the contemporary world the problem is not how to get information, but rather how learners can be better prepared as critical consumers of knowledge and innovative thinkers (Carneiro, 2012). Another future concern is defeat of attention in science, which has been linked to traditional, monologic and Transmissive modes of teaching.

Dialogic interaction essentially engages the teacher converse verbally with students, or students cooperate with other students. Dialogic interaction is related to talkative dialogue, highlights the organized and supportive environment of communication, and is initiated through the success of dialogic approaches to teaching. Educational research and the evaluation of teaching can be improved based on Vygotsky’s (1978) basic thoughts about learning through communication and interaction. The socio-cultural method has directed researchers for discovering the nature of associations taking place in the classroom, rather than focus only on learning outcomes. Classroom dialogues should make strength between demanding and supporting for specific learning aims and responsibilities at hand (Ruiz-Primo 2011). Scaffolding could be understood either as a wider approach to education in common (macro-level) or as telling single educational activities (micro-level).

Another symbol of a probable dialogic approach is the use of time following questions. Students are given enough time to develop responses after assigning the different types of questions for thinking and reasoning (Ruiz-Primo 2011), which are in them analytic of dialogic teaching. Teachers could participate being referred to answer the questions, and certainly welcome inquiries from students utilizing a few procedures, for example, put exchanging and engaging themes to help students with creating questions. Dialogic educating basically welcomes students' considerations and feelings, enabling them to think, translate and produce new understandings. Dialogic instructing, it must be stated, has been less inquired about with grown-up students; most research has focused on youngsters in essential and optional school classrooms (Fisher, 2009; 2013 ;) Questioning is said to enable students to guide their learning as they endeavor to

"combine their earlier learning and new data in their attempts to comprehend these thoughts" (Almeida, 2011).

### **Objectives**

1. To find out the current practices of dialogic approach in teaching.
2. To investigate the teachers perception regarding dialogic teaching approach in teaching.

### **Research questions**

1. What are the current practices of dialogic approach in teaching?
2. What are the teachers perception regarding dialogic teaching approach in teaching?

## **Literature Review**

There are multi-implications and definitions exhibited for Dialogue, for example, the word exchange has gotten from Greek word dialogos. The verb type of dialogos is dialegesthai which intends to do a 'discussion'. Exchange is utilized as a part of regular oral association or discussion between individuals. It isn't confined to just two individuals as a few people may misunderstand the prefix of dia and decipher it to 'two'. In any case, the truth of the matter is that the word exchange is consolidated from two Greek words (dia and logos) which has distinctive importance as dia is meant 'through' and logos is meant "word(s), talk, talk, thought, reason, information, hypothesis" (Linell, 2009 p. 4). Dialogue transforms the explanation of personal interaction and sharing thoughts among the people by thinking and logic for greater understanding on a matter (Kazepides, 2012).

A number of researchers make a distinction dialogue from conversation (McLaughlin, 2000; Hoover, 2011; Kvernbekk, 2012; Worthy et al, 2012). Kazepides (2012) argued that dialogue isn't a similar like discussion, visit or argument. In talking there is no a specific objective and goal to accomplish, while in dialog and debate each individual tries to win the argumentation, so they are holding fixed position and inspire their own particular thoughts on others. In discussion the end stages are not clear at the opening, and in addition there are differing exchange of thoughts among the members without a reasoning and logical association of thoughts. While, in classroom exchange the end point is every now and again clear for the teacher, and furthermore there is a consistent chain of thoughts among the participants. According to, Bakhtin (1986) makes a refinement among discussion and discourse by the demonstration of addressing. For instance, "If an answer does not initiate another inquiry from itself, at that point it drops out of the dialogue" (cited in Walshe, 2013 p.134).

Alternately, various different analysts utilize the terms discourse and discussion likewise with dialogue (Jones 1997) and Ness and Williams (2009) contended that, "dialogue is a procedure of questioning and discovering that depends on transparency, tuning in, creating importance, and sharing learning through discussion. It is a shared way to deal with talk that tries to manufacture awareness, challenge suspicion, and achieve further understandings of issues (p.193)".

To end this dialogue, each conversation between a teacher and students and among the students that depends on awesome level of considering, thinking and investigating an individual thought that is dialogic approach. As Alexander (2005) recognized that conversation as "accomplishing normal comprehension through organized, combined addressing and dialog which guide and provoke, decrease decisions, decrease faults and blunder, and assist "handover" of ideas and principles" (Alexander, 2005 p.12). It implies that teacher educators should plan clearly, friendly, motivated, dynamic and gainful classroom condition when they execute dialogic conversation, due to create the learning of students of the related topic.

### **Dialogue in classroom**

Dialogue is a major joined procedure of considering, thinking, receptiveness and consolidating thoughts on complex issues, to achieve further comprehension on a similar issue. As a matter of fact, it gives an adaptable learning condition to students to investigate differing viewpoints around difficult issues. In addition, discourse urges members to make new information to the issues which are not accessible to them some time before. connect the students in dialogue is imperative scholastically, personally and socially in light of the fact that students are themselves exploring truth and speak with each other, so as to perceive the difficult issues (Ness and Williams 2009). few different analysts proposed that dialogue set up shared connection amongst the teacher and students to reproduce information and build up the students' psychological procedure (Mclaughlin, 2000). Sherrod and Wilhelm (2009) illustrated that, in dialogic conversation students equally build learning and upgrade their own particular subjective comprehension through sharing thoughts. For example, when one of the members is communicating his/her conclusions (teacher or student), others listen deliberately and analyze by logical thinking (e.g. what does that mean...?), then they support a similar thought, not identical but rather to some degree in an unexpected way. In this aggregate considering and connections rise new ideas, learning and translation among the members.

Learning is built from books or different assets when students refer to them "both the getting a handle on of what others have officially comprehended and the managed, aggregate push to extend the limits of what is known" (Watkins, 2005; referred to in Lyle, 2008 p. 232). The main importance of dialogue is to increase the learning of students and to engage them effectively by finding the significance to the content (Hattie, 2008). In this way, dialogue contributes each individual student in the class to enhance their learning on their content, and in addition to upgrade their ability of reasoning and thinking aptitudes on oral language. Dialogue makes conceivable outcomes for students to connect with others in a joint activities (in gathering, peer or even in entire class) for growing their understanding (Simon, 2013). In this manner, social gathering learning and companion joint effort are assuming the fundamental parts in learning advancement by facing various thoughts; they may well enhance their reasoning and logical abilities and reflect freely with each other in a dialogic approach (Wang, 2007). Moreover, as Vygotsky suggested, it is language that builds up the human mental capacity, understanding an issue and gives chances cooperative interaction with others and together thoughts (Wells & Arauz, 2006). Since the importance of our lives relies upon the value of our reasoning to connect and share thoughts with others through listening and speaking (Fisher, 2007). Dialogic approach is indispensable to learning since it plots the style of verbal cooperation of correspondence that urge students to a line of request in the social structure amongst teacher and students and among the students. Truth be told, it makes people for joint thinking, which means making and scattered knowledge (Burbules & Bruce, 2001). Thus, Freire (1996) expressed that, through dialogue, the teachers and students are mutually responsible to enhance the learning procedure. Dialogue creates and requires basic logical thinking which is exceptionally basic for the high level of learning accomplishment. Also, Freire contended that without dialogue it isn't possible to conversate and without conversation it isn't easy to get a good education. Unquestionably, the utilization of dialogue in the learning procedure is a good for the students and further comprehension of an issue. Additionally (Connor & Michaels, 2007) noted that, a few students may have more learning about some theme than the teachers. In this manner, it is essential for teachers to keep a dialog position for reconstructing the students thinking, logic and experience about a point. So dialogue assumes a focal position in learning since members express their conclusions, investigate their own insight and comprehend diverse thoughts in the classroom.

Kazepides (2012) contended that free dialogue is the nourishment of brain and the advancement of educational process. "Not exclusively is dialogue at the focal point of all education, it is additionally the best techniques for educating the youth (p.924).

### **Principles of dialogic teaching**

According to Alexander (2005), dialogic teaching in the classroom can be classified in five types of discourse which are given below:

#### **1. Collective**

Teachers and students concentrate on learning tasks jointly whether as a group or as a class, rather than in separation.

#### **2. Reciprocal**

Teachers and students pay attention to each other, share themes and ideas and consider alternative.

#### **3. Supportive**

Students communicative their ideas freely, without any fear of shame over 'wrong' answers; and they assist to each other having understandings.

#### **4. Cumulative**

Teachers and students build on their own and each other's ideas and sequence them in consistent lines of thinking and enquiry.

#### **5. Purposeful:**

Dialogic approach remains purposeful due to the planning of a teacher with specific educational goals in view.

### **Difficulties regarding dialogic teaching**

In spite of the considerable number of advantages of dialogic that have been mentioned above, it is not a simple activity to actualize a beneficial dialogic approach in classroom. It is time consuming that there is need to get data and arrange opinions. (Lyle, 2008; Worthy et al., 2012) The distinctive social and cultural parts amongst students and teacher influence barrier to actualize to dialogic method, and furthermore, it is troublesome for teacher to include all students similarly by time and turn, even in a little class (Black, 2005a). The absence of abilities and comprehension of teachers who don't know how to arrange and get ready viable planning; in order to include all students effectively in a activity caused the predominance of educator voice instead of students to make significance from themselves. Non friend relationship and absence of regard amongst educator and students and among the students are different barriers to dialogic approach in the classroom (Lyle 2008). Moreover, as Linell (2009) noted, disagreement, disturbance, noise, antagonism, bitterness and so on creates issues and learning can be damaged in such cases. According to Haneda and Wells (2008) the student welfare is vital importance if that is at danger a monologic style of teaching is better than dialogic one. So it is important for teacher to be aware of the positive and negative characteristics during the execution of dialogic approach in class room, in order to enhance the learning task in a safe and friendly environment.

### **Research Design**

The present study was descriptive by nature. Survey was used as a research designed. The population of the current study was teachers, who teaches in different levels. Questionnaire was used as research tools. All the statements of the questionnaire was related to dialogic approach in

teaching. The reliability and validity of the questionnaire was insured. Researcher personally visited and collected the data. SPSS was used in data analysis. All the data was presented in the form of tables as well as figures.

### Data analysis and interpretation

Data were collected, analyzed and interpreted. Percentage was used to analyze the data.

**Table 01 “Express opinions”.**

The opinions of the teachers regarding the question that, “In dialogic approach, students express their opinions freely in the classroom without any fears.”? The perceptions of the teachers were presented in the below table.

S. #	Items	frequency	Percentage
1.	Strongly Disagree	2	5.0
2.	Disagree	5	25.0
3	Neither agree nor disagree	1	2.5
4	Agree	9	22.5
5	Strongly agree	26	65.0
Total		40	100

According to table and figure 01 presented that, 2.0% teachers responded to “strongly disagreed” statement, 2.0% teachers responded to “disagreed” statement, 1.0% teachers responded to “neither agree nor disagreed” statement, 9.0% teachers responded to “agreed” statement as well as 65.0% teachers responded to “strongly agreed” statement. Thus, it is revealed that majority of the respondents were agreed the statements that in dialogic approach, students express their opinions freely in the classroom without any fears.

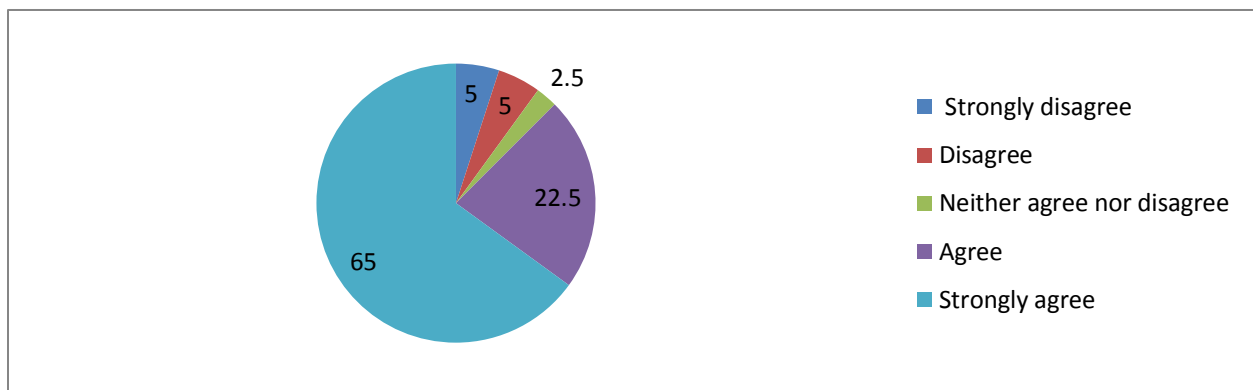


Figure 01 “Express opinions”.

**Table 02 “Time-consuming”**

The opinions of the teachers regarding the question that, “Dialogic interaction is time-consuming.”? The perceptions of the teachers were presented in the below table.

S. #	Items	frequency	Percentage
1.	Strongly disagree	4	10.0
2.	Disagree	3	7.5
3	Neither agree nor disagree	5	12.5
4	Agree	7	17.5
5	Strongly agree	21	52.5
Total		40	100

Figure and table 02 revealed that, 10.0% teachers responded to “strongly disagreed” statement, 7.5% teachers responded to “disagreed” statement, 12.5% teachers responded to “neither agree nor disagree” statement, 17.5% teachers responded to “agreed” statement and 52.5% teachers responded to “strongly agreed” statement. Therefore, it was decided that the majority of the teachers were agreed the statement that the Dialogic interaction is time-consuming.

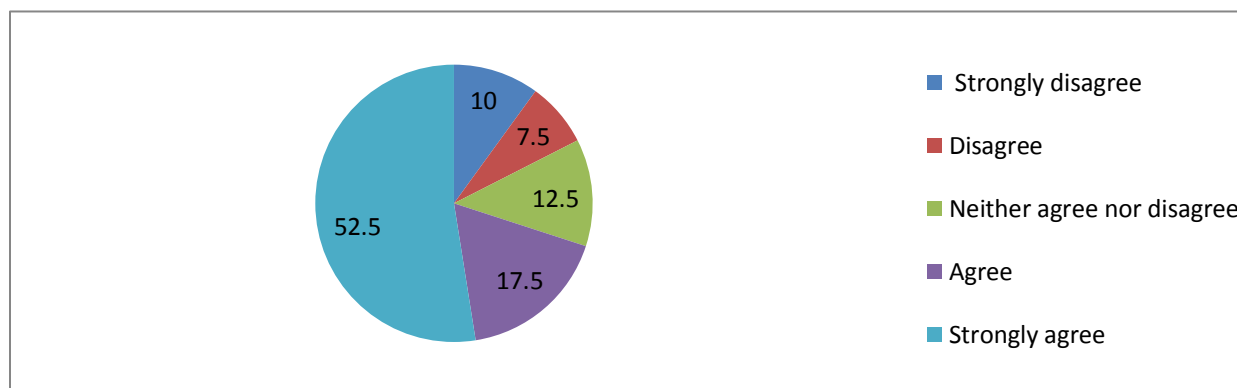


Figure 4.2: “Time-consuming”.

### Findings

1. According to table and figure 01 presented that, 2.0% teachers responded to “strongly disagreed” statement, 2.0% teachers responded to “disagreed” statement, 1.0% teachers responded to “neither agree nor disagree” statement, 9.0% teachers responded to “agreed” statement as well as 65.0% teachers responded to “strongly agreed” statement. Thus, it is revealed that majority of the respondents were agreed the statements that in dialogic approach, students express their opinions freely in the classroom without any fears.
2. Figure and table 02 revealed that, 10.0% teachers responded to “strongly disagreed” statement, 7.5% teachers responded to “disagreed” statement, 12.5% teachers responded to “neither agree nor disagree” statement, 17.5% teachers responded to “agreed” statement and 52.5% teachers responded to “strongly agreed” statement. Therefore, it was decided that the majority of the teachers were agreed the statement that the Dialogic interaction is time-consuming.

### Conclusion

Based on findings, it also revealed that teachers agree on the united process of thinking, reasoning, openness and combining ideas on complex issues, in order to reach deeper understanding on the same issue. Actually, it provides a flexible learning environment for students to explore diverse perspectives around difficult issues. Engaging students in dialogue is important academically, personally and socially because students are themselves investigating truth and communicate with each other, in order to recognize the complicated issues (Ness & Williams 2009). Similarly, several other researchers suggested that dialogue set up mutual relationship between teachers and students to recreate knowledge and develop the learners' cognitive process (Mclaughlin, 2000). Most teachers were aware of the concept of Dialogic teaching encourages participants to create new knowledge to the issues which are not available to them before. Most of the teachers were in view that different social and cultural roles between teacher and students make barriers to implement dialogic teaching, and also, it is difficult for teacher to involve all students equally by time and turn

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## THE LINGUISTICS AND THE SELF REPRESENTATION IN SUICIDAL NOTES WRITTEN IN A SOCIETY UNDER CRISIS: The Case of Greece

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### ABSTRACT

Suicide, the act of deliberately killing oneself, is a prominent topic in many important works of human sciences (Joiner, Rudd, 2000). Life events can trigger suicidal thoughts and appear in suicidal notes and letters to communicate the language of their pain. They often involve the loss of an established way of life or the lost of a loved one. In fact, as we will point, this loved one might be the self we knew in a prior way of life, the self we have invested with sentiments and the self we have invented using proper qualities and memories<sup>55</sup>. In our paper we examine as Case Studies 3 suicidal notes written in a society under crisis. A society that due to the loss of the Self, (Personal or Collective) had to invent a new language of pain as Wittgenstein (2001) has defined and the linguist Halliday has studied in language and as applied in society through politics and the writings of people who committed suicides in Greece of the contemporary Crisis.

**Key Words:** Cultural Studies, Suicide, Sociolinguistics, Language of Pain.

### INTRODUCTION

*Tremendous Pain had fallen upon Greece. All those bodies thrown in the jaws teeth of the sea in the teeth of the earth. All those souls thrown in the windmyll rocks like the wheat*  
G. Seferis, *Greek Nobel Prize Winner*

The subject of suicide itself is controversial. While the act of suicide can be symbolic in literature, the act itself still possesses the ability to cause controversy in the real world. It is typically an outcome that can be attributed to any combination of acute factors and can express in a loud way or deeply denounce many political, social, cultural or religious factors<sup>56</sup>. In our paper we will examine the ways suicide is represented in suicidal notes written in a society under financial and cultural crisis like Greece in recent years. We will try to explore what these notes reveal for the personal and collective self and in which type of suicide according to its classic "Durkhemian" classification and if certain peculiarities in Greece of contemporary crisis exist.

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<sup>55</sup> Dohrenwend, Bruce P. (1959). "Egoism, Altruism, Anomie, and Fatalism: A Conceptual Analysis of Durkheim's Types". *American Sociological Review*. 24 (4): 473.

Also in Cf. Gibbs, J. P. and W. T. Martin. 1958. "A Theory of Status Integration and Its Relationship to Suicide." *American Sociological Review* 23:14-147.

<sup>56</sup> Thomas Joiner, M. David Rudd, *Suicide Science: Expanding the Boundaries*: Kluwer Academic Publishers, Springer, USA, 2000



Where suicide is considered an impulsive act at any age, financial or political suicide is often a grim outcome (Gibbs, Martin. 1958) derived from the manifestation of tendencies experienced in social and psychological level.<sup>57</sup>

In one of the groundbreaking books in the field of sociology, *Suicide* (French: *Le Suicide*) Durkheim exploring the differing suicide rates among Protestants Jews and Catholics, established broader conclusions concerning suicide and distinguished four main types:

*Egoistic suicide* reflects a prolonged sense of not belonging, of not being integrated in a community, an absence that can give rise to meaninglessness. Durkheim refers to this type of suicide as the result of "excessive individuation", meaning that is a result of a breakdown or decrease of social integration.

Altruistic suicide is characterized by a sense of being overwhelmed by a group's goals and beliefs. It occurs in societies with high integration, where individual needs are seen as less important than the society's needs as a whole.

*Anomic suicide*: reflects an individual's moral confusion and lack of social direction, which is related to dramatic social and economic upheaval. It is the product of moral deregulation and a lack of definition of legitimate aspirations through a restraining social ethic, which could impose meaning and order on the individual conscience. This is symptomatic of a failure of economic development and division of labor to produce Durkheim's organic solidarity.

*Fatalistic suicide*: the opposite of anomic suicide, when a person is excessively regulated, when their futures are pitilessly blocked and passions violently choked by oppressive discipline.

These four types of suicide are based on the degrees of imbalance of two social forces: social integration and moral regulation<sup>58</sup>. These two forces seem to be in the front line in the modern global crisis, manifested in various sectors of financial and social activity and expressed, according to the British Journal of Psychiatry and others, with dramatic dynamic in the fields of personal level that are involved to sociopsychological behaviors and conditions.<sup>59</sup>

Sociopsychological behaviors and conditions are connected in an exceptional way to Social psychology, a primary tool in seeking appropriate meaning and interpretation for human perceptions, comprehensions and interpretations of the individual and the collective conditions and functions (Inkeles, 1959). Social Psychology requires new dimensions in eras of dramatic transition as the one we are going through. Primarily involves effectively interpreting human behavior as it relates to social influences, and of course, explores among others the effects of *irreversible changes in lifestyle*. Generally speaking, social psychology involves understanding

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<sup>57</sup> Psychological Characteristics of Adolescents Orphans with Different Experience of Living in a Family Tatyana I. Shulгаа , Daria D. Savchenkoa and Evgeniya B. Filinkovaa International Journal of Environmental & Science Education 2016, Vol. 11, No. 17, pp 10493-10504

<sup>58</sup>Cf. Inkeles, A. 1959. "Personality and Social Structure." pp. 249-76 in *Sociological Today*, edited by R. K. Merton, L. Broom, and L. S. Cottrell. New York: Basic Books.

Also in Dohrenwend, Bruce P. (1959). "Egoism, Altruism, Anomie, and Fatalism: A Conceptual Analysis of Durkheim's Types". *American Sociological Review*. **24** (4): 473.(ό.π.)

<sup>59</sup><http://bjp.rcpsych.org/content/early/2014/05/23/bjp.bp.114.144766>

Also <https://www.forbes.com/forbes/welcome/?toURL=https://www.forbes.com/sites/melaniehaiken/2014/06/12/more-than-10000-suicides-tied-to-economic-crisis-study-says/&refURL=https://www.google.gr/&referrer=https://www.google.gr/>

how human behavior and thoughts are influenced by members or groups within a society. In retrospect, social psychology is largely research-oriented and less concerned with creating real-world applications (CTU Online, 2009).

Yet there seems to be a suicidal pattern to societies under crisis<sup>60</sup>, a real world enigma, a scream that in societies' like contemporary Greece takes some specific dimensions. According to formal data (that in many cases try to beautify reality and soften its hard edges not including deaths caused by so called "accidents" or "natural reasons" the suicidal rate in Greece presents a dramatic increase<sup>61</sup>.

Suicidal Rate in the 80's	Suicidal Rate in the 90's	Suicidal Rate in the 2010
0,17	0,16	4%
Suicides per day in the 80s	Suicides per day in the 90s	Suicides per day in the 2010s
---	---	In 2011. 328: almost 1 per day

Greece presents a shocking- and champion through Europe- increase of more than 17% the years of the crisis, (2011-2012) and according to a recent research<sup>62</sup> in the highly estimated Lancet review in the first half of 2011 in comparison to 2010 we have an increase of 40% and the rate is growing through 2012. That takes new dimensions if we compare it with the statistical data prior of the crisis were Greece was in the bottom. There were a lot of reasons used to explain why Greece was a country with such a minor percentage of suicides B.C. (before crisis).

It was due to persistent religious beliefs of the Greek orthodox, that in relation to what Durkheim had found about other religious groups sustain people in eras of turmoil?<sup>63</sup> It was because of the institutions like family in a family centric society that presented strong bonds replacing the lack of a welfare state?<sup>64</sup> Despite the fact we don't have a certain answer and the combination might be an answer in itself, we do have specific and dramatic data that speak about a constant tragedy of real people in a planet that not only puts profits before people, but invents in its political rhetoric "great excuses" like racial or ethno-racial readings of the causes to justify this cynicism. Nor crisis nor suicides are of course Greek characteristics.

Also, in the United States for instance were this global crisis was first manifested, there is a growing concern about the suicidal rate and its connection to dept crisis. According to David Alecock, a vice president of a non-profit credit counselling service, "financial stress can negatively - even severely - impact things outside of the wallet: your health, your job and your relationships". Indeed, severe dept can cause depression and even suicide. News reports from across the globe tell of desperate acts by debtors. Daniel J. Reidenberg, a psychologist and executive director of Suicide Awareness Voices of Education (SAVE), says: "When someone is suffering from depression, their brain doesn't think logically or rationally, so they're not able to

<sup>60</sup> Emile Durkheim, *Suicide : a study in sociology*. London, 2001, The Free Press

also <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC4473496/>

<sup>61</sup> <http://bjp.rcpsych.org/content/early/2014/05/23/bjp.bp.114.144766>

<sup>62</sup> <http://bjp.rcpsych.org/content/early/2014/05/23/bjp.bp.114.144766>

<sup>63</sup> Stark, Rodney; Bainbridge, William Sims (1996). [Religion, Deviance and Social Control](#). Routledge. p. 32.

<sup>64</sup> Γσουκαλάς Εξάρτηση και Αναπαραγωγή: Αθήνα, Θεμέλιο, 2000

consider options. They're not able to find resources. They're not able to get out of bed let alone make a phone call. They can't take care of themselves; depression literally takes over their life."<sup>65</sup>

For example, Carlene Balderrama, a 53-year-old Massachusetts woman, was distraught when her home was foreclosed. She hid her family's money problems from her husband and blamed herself for mismanaging the finances, so in late July 2008, 90 minutes before her home was auctioned off, she killed herself with one of her husband's hunting rifles. According to reports, her suicide note said she had become too overwhelmed, and that she wanted her family to use her insurance money to pay off the debt and keep the house.<sup>66</sup>

## GREECE: A SOCIETY UNDER TRANSITION

Transitions are periods of time that challenge the notion of the individual and collective self. They also challenge the notion of the other and that seems appropriate as every research about the other is a research about the self, about the limits, the values, the possibilities of human "nature" and society.<sup>67</sup> Greek society has been under a tremendous transition in a short period of time. From a monocultural country used to send immigrants abroad it was transferred into a multicultural country that had to accept immigrants within. According to formal data the average of the immigrants was exploded along with border keeping expenses within Dublin 2 and that in a conservative, and unprepared society created a vast wave of xenophobia.. Exploiting immigrants and local workers the 90s was a good period and "Olympic Greece" was created, along with the entrance to Eurozone. None of these was irrelevant to the sociopsychological conception of the collective Greek Self. To take it from the start there is a deep rift in Greece consciousness as from national liberation had to be related to the superior western civilization from one point (and it was superior due to neoclassicism) and on the other hand it had to be related with the strong *New - orthodox* eastern feeling that detached us from the rest western Europe. F.i. as Liakos points (1993) in Greece, people express strongly «a failure of the expectation that the national independence could lead to catching up with Europe».

This failure of expectations, manifested as a «Negative Consciousness»<sup>68</sup>, was articulated around the idea that «we are not equal to our Past» It generally describes the *Balkan culture* as a Self- Colonising Culture and it is based on the idea that «the so called Civilised Others are everything we are not». Greece's case from this point of view results into an internalization of its «otherness», according to the cultural and social standards that have been imposed or achieved by the hegemonic countries. And otherness means among others' stereotypes. The inclusion of Greece in EU helped to restore an ideal self and for many years Greek people were the most faithful in the European idea, according to Eurostat's questionnaires. .But it remained an "other". Greek society because of its own misbehaviors and years of colonisation was the weakest economy in Western Europe. Yet crisis was attributed not into primarily global structural

<sup>65</sup> <https://www.creditcards.com/credit-card-news/debt-depression-and-suicide-1264.php>

<sup>66</sup> United States of America Congressional Report: Proceedings and Debates on the 110<sup>th</sup> Congress, Second Edition, Vol. 154, Part 12, July 24<sup>th</sup> 2008 to July 30<sup>th</sup>, p. 16541.

Also <http://abcnews.go.com/Health/DepressionNews/story?id=5444573>

<sup>67</sup> Adler, P. The Transition Experience: An Alternative View of Cultural Shock:, Journal of Humanistic Psychology, vol. 15 (4), p. 13-14

Also in Kuhn, T.S.The Essential Tension: Selected Studies in Scientific Transition and Change. Chicago and London: University of Chicago Press, 1997.

<sup>68</sup> Kiossev, 2004

characteristics, but into Greek characteristics, in a way similar, despite obvious differences, to where the financial crisis was perceived in the 30s. For instance, as an aspect of European and Greek sociopolitical elite; the Greeks were perceived as the causes of the crisis and people who worked less. According to the formal statistics of Eurostat, (May 2011) the 3 countries that present the highest rate in working hours belong to the so called pigs P.I.G.S.: Portugal, Italy, Greece, Spain), having Germany in 1390 hours and Greece in the first position of the highest rate working time with 2.119 hours.<sup>69</sup>

As for the Well Fare State that in Greek case was accused of being gigantic according to the formal statistics the cost of the State into the was in 2009 17,3% in Greece while the average in Eurozone was into the 21,8%, while countries like Sweden and France over exceeded with a rate of 28% and 24% accordingly. Having those as givens Greek people had to adjust in the old rift, the old gap between its western and eastern self.<sup>70</sup> Between a cynical sense of “we are different and who cares EU is going to fail anyway” and a bitter sense of being betrayed, facing a modern scapegoating. The complex anger underneath everyday life produced a variety of reactions. Since demonstrations were the most out loud proof of materials found for our study, suicides was the most tragic act that comes after what language describes.

Since there is not a comparative research that has been done on the suicidal notes written in contemporary societies under crisis, we will focus on the Greek example in our study and we will proceed to the discourse analysis of texts, which are studied for the first time and they are rare and unique primary material of our own study.

## THEORETICAL FRAMEWORK OF THE STUDY

In our research about psychic pain of suicide notes the well-known philosopher Wittgenstein<sup>71</sup> gave us the idea of investigating the private language of pain in *Philosophical Investigations* (paragraphs §243 - §315). As a theoretical framework of what the studied letters reveal ideologically speaking to the readers who are family, friends and the whole society in many cases. Wittgenstein (2001) in his *Philosophical Investigations* put the discussion of language and continues with a discussion of meaning and understanding of pain. Since our times are painful as body or psychic pain, usually both; we considered this matter important to the status of education that society can have through the language truth of people in pain to a global system of humanity and politics.

In his arguments Wittgenstein points that understanding pain and meaning of the idea of pain are not mental states of consciousness. He rather believes this argument by saying that “one loses consciousness, (for example at sleep which is close to death condition), one does not lose the meaning of saying ‘red’; whereas in pain one does lose such sensation when one is not conscious”<sup>72</sup> We keep as a theoretical framework also the statement: “I want to talk about a ‘state

<sup>69</sup> Eurostat, 2010

<sup>70</sup> Kiberd, D., *Inventing Ireland* Cambridge, Mass.: Harvard University Press, 1995. Also Gourgouris Spiros, “*Dream Nation: Enlightenment, Colonization, and the Institution of Modern Greece*”, California, Stanford University Press, 1996.

<sup>71</sup> Wittgenstein, 2001.

<sup>72</sup> Collin Mc Ginn : in Wittgenstein on Meaning in B. Blackwell: Oxford, 1989, pp. 3, 94-109, Mc Ginn "[Sometimes in the Grave Is a Fine and Public Place](#)" 1989.

of consciousness', and to use this expression to refer to the seeing of certain picture, the hearing of a tone, a sensation of pain or of taste, etc. I want to say that believing, understanding, knowing, intending, and others are not states of consciousness." <sup>73</sup>

In our attempt to study the pain language of suicide letters we take the initiative to introduce a theoretical proposal based primarily on mimetic and cultural evolution as a theory of evolution of pedagogy and the mimetic function in cultural linguistics. Evolutionary sociolinguistics and cultural linguistics interpret the role of biology in language expression. From this point of view we may be able to educate society through remodeling methodological teaching practices that do not depend on mythical experiential teaching as a panacea, but guide a strategy of strengthening conscious decision making and critical awareness. The expression of pain as an instinctive and biological choice is a matter of study chosen to attempt the experiential approach (since all people from birth have experiences of pain) and expressive function with linguistic choices and / or body language. The pain mechanism, a survival language of body and psychological pain in humans as well as in animals is not only a concern of philosophers but of linguists, too.

Functions of Language are an international journal of linguistics which explores the functionalist perspective on the organization and use of natural language. This is the journal where we find the well-known linguist M.A.C. Halliday for another time and scientific area talking about the grammar of pain. Among other functionalist linguistics, Halliday (1998) seeking to bring out the fundamental unity mentions the interplay of theory and description, of linguistic data from the aspect of the English language of Pain. In each culture pain is expressed in writing and speech in different ways revealing how attitudes and ideological issues form into words, figurative phrases or a scream, in our case a language example before death. This scope is broad in communicative context and regularities of pragmatics, conversation and discourse. The purpose is mostly to contribute to our consideration of how the use of languages in speech and writing has impacted, and continues to impact, upon the structure of psychic pain grammar at this case of discourse analysis <sup>74</sup>.

## METHODOLOGY AND DATA

We studied those letters as demonstrations /representations of written logos, and we contacted written logos as a part of an extended social critique (Zima, 1995). A Representation is an "artistic form" of ideology <sup>75</sup> produced within a pre-given status of meanings, (a status related with the social, financial and cultural readings that prevail in the world in a certain historical context) and yet influenced by personal characteristics of its producer(s) and their sub-cultures. Social criticism can also be expressed in a fictional form, e.g. in a revolutionary novels or in dystopian novels or political novels. Fictional literature can have a significant social impact like the cases Euripides or Hugo or Ibsen and so many others. But according to the Sociology of Literature and Cultural Studies <sup>76</sup> what makes autobiographical texts worth reading is the fact that they can include 'the voices of the voiceless', the representations and the experiences that are

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<sup>73</sup>RPP vol. II, 45.

<sup>74</sup>Halliday, 1998, Halliday & Matthiessen 2004.

<sup>75</sup>Strauss, Robert (2004-03-28) The New York Times. Retrieved 2007-08-21.

<sup>76</sup> Kathrin Nelson Self and social Functions: Individual autobiographical memory and collective narrative [http://projekt.ht.lu.se/fileadmin/user\\_upload/project/ccs/9534453.pdf](http://projekt.ht.lu.se/fileadmin/user_upload/project/ccs/9534453.pdf)

usually omitted by the forces and in the hegemonic discourses and rhetorics. So is the discourse analysis of the written notes able to bring forth such connotations? This helped us build the Hypothesis of our study as we see at the next chapter. At this context we decided that it is appropriate to declare some of the evolutions that happened in the social scale. Evolutions as sort of the gradual development in speech that had an impact in people's psychological scale before their word became a suicide act.

Where there any patterns in the suicidal Notes of our case studies? And if so what they can reveal about the negotiations between the collective and the personal Self? Every negotiation and transition in societal and psychological level is expressed among other things in an artistic form. In other words becomes a Representation that produces other Representations. What kind of suicide is revealed in those representations? (a) What elements of the Language of Pain we may trace? (b).

### The Letters

If Representations are considered an important field in humanities it is because they can offer to the comprehension of relations of power and also to personal perceptions. As it was written to write or read is not about understanding words but the world. From a very long line of real people we will present the 3 most famous letters (and famous because they were vastly reproduced from social media and people identified with them).

The first belongs to a 63 year old pensioner that one morning went to the Syntagma Square (the square that carries a special political burden according to the Greek history) stood under a tree and put a gun in his head, exploding his brains. In the letter he left in the tree and a copy of it in his house he wrote among others: *The occupational government Tsolakoglou<sup>77</sup> has minimized my chances for a decent living that was based on a pensikon that myself and only myself paid for 35 years of constant work. I have no option for a decent end before I start searching my living in the garbages. I believe that young people with no future one day will take the pistols and will hang in Syntagma square the national traitors like Italians did to Mussolini in piazza Boreto in 1945.*

A few weeks later a 45 y.o. teacher that killed, stated in his political will: *I feel humiliated as I don't have money to sustain myself. I denounce the world order, a fatal capitalism that kills people, I can't stand the extermination of life and lives of the others. I commit suicide to give a desperate message before the anger of people draws everything!*

And in the very centre of Athens a 50 y.o. musician, at 9 in the morning, took his mother went to the roof of their building throw his mother and then himself. In his note he stated: *For 20 years now I take care of my incapable mother (90 years old). The last 3 4 years she has developed Alzheimer and schizofrenic crisis.... I have no cash and I borrow with 22% of rate despite they fact the bankers borrow with 1% rate. I have health problems myself. And no solution in front of me. Leaders of the earth you deserve to be hanged for the crisis you have produced.*

### THE REPRESENTATION OF THE SELF IN SUICIDAL LETTERS

In all those letters despite the differences in the articulation, there are some common patterns. First they all seem incapable of taking care of their lives. Then they need to mirror it and connect

<sup>77</sup> Tsolakoglou was a notorious prime minister under the Nazi Regime in Greece

it with the majority. They all seem to have the need to denounce reality in a political way, to make their death to have a broader meaning. They refer to the personal problems the Momentum caused in their lives and in the same time they connect it with a collective faith and the need for a collective change. None of them belongs to elite parties of the society ( in those segments of the Greek population life goes on without problems after all) but they are not proletarians either. They seem to possess a cultural capital. That means they feel they lose a self and life style they had learned to identify their ideal self image with.

All letters point to that decline. There is a comparison with their prior lives but refuse to fell detached from the social community. They express o pro community rhetoric and they proposed solutions (even desperate solutions) and wishes to those left behind. From this point of view despite the letters do refer to the obvious anomia of the world's financial and social order they finally connect they desperate act with **an altruistic suicide**.

On the contrary to Balderrama's and other letters from the states, the hegemonic suicidal logos in Greece seems high politicized. We do have the impression that in states for example (and we will not a comparative study the following years) the very personal suicidal logos expresses a combination of egoistic (as they feel socially excluded from their community) and fatalistic sense of suicide, as people fill they live under a financial totalitarianism.

Having that as a given we conclude that in Greece evolves a kind of **Political suicide**, a suicide that wants to bring forth and/or to defend the collective goals of a group or a community. From this point of view political suicide might be described like that: As an altruistic action derived from an anomic analysis. But it is also a choice invested with a universal rhetoric not of a passive victim but of a perpetual, of a constantly returning I mean scape goat that in a few years will escape Greece and will have a new name and a new country as its field.

At the same time, it confirms some of the Durkheim's conclusions. Among others in Greece is established that: - None of them belongs to elite parties of the society, (in those segments of the Greek population life goes on without problems after all), but they are not proletarians either.

-They seem to possess a basic cultural capital: A musician, a Teacher, and a Civil Servant Pensioner. That means they feel they lose a self and life style they had learned to identify their ideal self image with.

- This loss, this "negative consciousness" in personal level it is obvious in phrases such as: "*has minimised my chances for a decent living*" (1<sup>st</sup> letter) *I have no option for a decent end before I start searching my living in the garbages.* (1<sup>st</sup> Letter) "*I feel humiliated as I don't have money to sustain myself.*" (2<sup>nd</sup> letter) *I have no cash and I borrow with 22% of rate despite they fact the bankers borrow with 1% rate.* (3<sup>rd</sup> letter). Thus, they all seem incapable of taking care of their lives.

But equally so they all express the need to denounce reality in a political way so as to explain their death as the result of a broader meaning making for society: *(leaders) will be hanged in Syntagma Square the national traitors like Italians did to Mussolini in piazza Boreto in 1945.* (1<sup>st</sup> letter) *I denounce the world order, a fatal capitalism that kills people, I can't stand the extermination of life and lives of the others.* (2<sup>nd</sup> letter) *Leaders of the earth you deserve to be hanged for the crisis you have produced.* (3<sup>rd</sup> letter)

In other words they refer to the personal problems the Momentum caused in their lives and in the same time they connect it with a collective faith and the need for a collective change. All letters point to that decline. There is a comparison with their prior lives but refuse to fell detached from the social community. They express o pro - community rhetoric and they proposed solutions (even desperate solutions).



A wish list of expressions are also a characteristic of the expression of the language of the suicide notes from the persons (writers ) to those left behind (readers): *I believe that young people with no future one day will take the pistols (1<sup>st</sup> letter) I commit suicide to give a desperate message before the anger of people draws everything! (2<sup>nd</sup> letter).*

-From this point of view, despite the letters do refer to the obvious anomia of the world's financial and social order and use words of extremism, they finally connect they desperate act within the category of **an altruistic suicide**. *Altruistic suicide* is functioned under a sense of being overwhelmed by a group's goals and beliefs. It occurs in societies with high integration, where individual needs are seen as less important than the society's needs as a whole.

### Language content –ideological aspects of the letters

-The authors of the letters express the need to mirror their aspect, often expressed as a kind of a reflective journal which connects their personal problem with the majority and the self with the others which refers to the category of a political suicide speech. It also is a formal need of communicating pain through written language which is also the speech that is not expressed in sounds and oral communication because there is a need of the private language, as Wittgenstein has mentioned in past. The self and the others in a linguistic aspect of dialogue with the self and dialogue with the hypothetic reader is also a two -fold reality at these letters. The authors want to share their story and write the history of an era. We cannot be sure if they do this consciously or unconsciously since they are not [present to interview the language pragmatics and semantics of each case. The similarities between the letters found in our research as they are already described are positive to our ideological analysis of the letters. The *Hegemonic Suicidal Logos* in Greece seems high politicized. We do have the impression that in the States for example the *Private Suicidal Logos* expresses a combination of *egoistic* (as they feel outlawed in their community) and *fatalistic* sense of suicide, as people fill they live under a financial totalitarianism. It would be important and we suggest that further research must be made to support these outcomes.

### CONCLUSIONS

Having that as a given we conclude that in Greece evolves a kind of **Political and altruistic suicide**, a suicide that wants to bring forth and/or to defend, as we point, the collective anguish and wishes/goals of a group or a community. From this point of view political suicide might be described like that: As an altruistic action derived from an anomic analysis. But it is also a choice invested with a universal rhetoric not of a passive victim but of a perpetual, of a constantly returning “scape goat” that in a few years will escape Greece and will have a new name and a new country as its field. In relation to our case studies we may observe that all 3 of them are in accordance to some of Durkheim's points.<sup>78</sup> The upper level of education might be traced to the suicide letters and the persons who have committed suicide during the crisis. All 3 of them were well educated. Also all 3 of them were men and single.

### What suicidal notes may reveal?

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<sup>78</sup> Durkheim, Emile *Suicide : A study in sociology*. London, The Free Press, 2001



The Memory of the groups is “conveyed and sustained” in the dimension of both political power and psychological mechanism, as Connerton (1989) argued in his famous research. Yet there is another conclusion that interests us: ‘The oral history of subordinate groups will produce another type of history: one in which not only will most of the details be different, but in which the very construction of meaningful shapes will obey a different principle.’<sup>79</sup>

Collective memory of society (social memory) is organized and legitimated through two social language activities: commemorative ceremonies and bodily practices. Both of them are deeply related with each other in the sense that commemorative ceremonies are embodied form of rites performed by the participants and without bodily practices there would be no particular type of acquired symbolic capital. Suicides described in those letters, **sacrificing** life to the only thing that subordinates it, moment, and using tragically body as an ancient *sf;agio* belong to this attempt and try to establish an alternative memory and practice of the subordinate, willing to warn us all.

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## The Impact of Mother's Anxiety Level on the Sex of the Baby

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### Abstract

This paper presents an empirical investigation of the mother's anxiety level of the probability of the sex of her baby. Using the questionnaire survey data, I collected the data for 82 mothers who gave birth to a child in the recent 3 years. Among these 82 participants, 52 of them have baby boys; 43 of them (about 52 percent) reported that they are under pressure when they conceived the child; 31 of them (about 38 percent) reported that they were currently unemployed. In order to examine whether there is any causal effect of feeling stressful on the sex determination of the embryo and more precisely to test whether stress under unemployment affect the sex of the baby, I adopt multiple regression analysis. Considering the dependent variable is binary variable, which is whether the sex of the baby is a boy or a girl, I adopted a probit regression model to do the analysis. The regression results indicate that the mothers who reported that they were under pressure when they conceived the baby are 13.82 percent more likely to have a baby boy. This effect is statistically significant at 2 percent significant level for a two-tail T test. The marginal effect of unemployment status on the probability of the sex of the baby is 0.0597, which means the women who were unemployed when they were pregnant are about 6 percent more likely to have a baby boy than those who were employed. This effect is also statistically significant at 2 percent significance level for a two-tail T test.

**Key Words:** Sex determination, Anxiety Level, Unemployment, Urban China, Probit Regression Analysis

### 1. Introduction

People always tend to believe that the sex of their baby is simply a matter of chance – determined by the father's sperm. This is also a traditional belief people have. The sex of the embryo has always been believed to be determined by whichever sperm wins the race to fertilize the egg (Garner, 2008; Welch, 1999; Spiller and Bowles 2015; Mannucci and Sullivan, 1994). However, if the sex of an infant is solely determined by the pure chance, the number of boys and girls being born should even out over time. In fact, if you look at the sex ratios at birth, which shows the number of boys born per one hundred girls born, you will find that research over hundreds of years has consistently found that boys naturally outnumber girls at birth. Historically, there has been about 105 boys born for every 100 girls worldwide, which generates a "sex ratio at birth" of one hundred and five, the share of boy babies has increased in recent decades. (Lenz and Jacob, 2007; World Bank Data). The global sex ratio at birth is now 1.07. To put it another way, one hundred and seven boys born for every one hundred girls (World Bank 2011). This increase in the sex ratio is driven largely by births in China, where sex ratios have been remaining the highest in the whole world (World Bank 2016).

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Two decades ago, Valerie Grant (1998) published a book “Maternal Personality, Evolution and the Sex Ratio: Do Mothers Control the Sex of the Infant?”. She did demographic studies and used data from human and animal to show that women who are dominant are more likely to have sons. Grant presented evidence that the mother’s personality can actually influence which type of sperm fertilizes the egg.

Some distinctive existing literature also claimed that feisty women are more likely to give birth to boys than girls (Grant, 1998; Dobson, 1998; Livingston, 2013), so if you are an expectant mother who likes to stand up for yourself, according to what they found, could soon be cuddling a newborn son (Grant, 1998). And the root cause of this phenomenon is the levels of testosterone in the womb. Related literature claims that high levels of testosterone in the womb provide a much better environment for the sperm coded to produce boys (Curran, 1992; Spiller and Bowles, 2015). As of now, the correlation between the level of testosterone and the sex of the embryo has been proved only in tests on cows (Curran, 1992). However, Sandra Curran who carried out the research expect the same outcome will be seen in humans. Testosterone levels rise in women under stress so those feeling anxious could also be in line for sons, according to the existing literature (Grant, 1998; Curran, 1992).

Inspired by this idea of Grant and Curran, I conduct an empirical investigation utilizing my own survey data to examine whether women who are under pressure are more likely to conceive male infants. In this article, the main cause of women’s anxiety level that I am interest in is their employment status because it is widely acknowledged that people who are unemployed usually undergo sufficient pressure and miserableness (Linn, Sandifer and Stein, 1985; Turner and Tumer, 2004; Pharr and Monnnie, 2012). However, it is also believed that other than being unemployed, many other variables can also affect women’s anxiety level, such as age, living conditions and so on. I also include some variables that I believe can affect or be influenced by women’s personality, such as education level, parents’ education level. In the regression analysis part, in order to get a more precise effect of the anxiety level and employment status on the sex of infant, I also include age of spouse, whether this is the first child, is the child’s birth place mother’s hometown and so on as my control variables.

The rest of the paper is organized as the following orders. Section 2 describe the survey data source. Section 3 states the empirical strategy and detailed variables in the regression equation. Section 4 presents the estimation results. Section 5 concludes the paper.

## **2. Data Source and Survey Sample**

Data was collected through my own survey data. I contact several hospitals in two provinces in China. I focus my attention to these two geographic locations, Shandong and Shanghai. After receiving the research permit from the corresponding hospitals, I was able to get access to the information of new mothers who were born their babies in the corresponding hospitals. I mailed out 236 questionnaires to those new mothers. Questions listed on the questionnaire survey include female’s conceptional age, education level, type of residence, family income level, employment status, parents’ education level, whether conceive the first child, spouse’s age, on the whole, whether you feel under stress when you conceived your child and please specify your stress level, and etc. Participants are expected to answer all the questions in the survey and mail

back to me. I ended up with collecting 82 respondents. Among these 82 participants, 52 of them have baby boys; 43 of them (about 52 percent) reported that they are under pressure when they conceived the child; 31 of them (about 38 percent) reported that they were currently unemployed.

The table 1 below shows the summary statistics of the information about all the 82 participants in this study:

<b>Female's employment status during the conception</b>			
51 employed	31 unemployed		
<b>Whether under pressure</b>			
43 under pressure	39 No pressure		
<b>Whether first child</b>			
71 first child	11 second child		
<b>Family Income level</b>			
3 below 50,000 RMB	13 50,000 - 100,000RMB	34 100,000 - 150,000RMB	4 150,000 - 200,000RMB
28 refused to answer			
<b>Whether birth place of the child is mother's hometown</b>			
37 Yes	45 No		
<b>Type of Dwelling</b>			
29 Rent	53 owner		
<b>Mother's education level</b>			
8 High school and below	50 college degree	19 Master degree	5 Master degree and above

### 3. Empirical Strategy

#### 3.1 Multiple Regression Analysis

In order to examine whether there is any causal effect of feeling under stress on the sex determination of the embryo and more precisely to test whether stress under unemployment affect the sex of the baby, I adopt multiple regression analysis. Considering the dependent variable is binary variable, which is whether the sex of the baby is a boy or a girl, I estimate the following probit regression model for each participant i:

$$\begin{aligned} \text{Probit} (E[Y^*_i|X_1, \dots, X_m]) &= \text{Probit} [(sex\ of\ the\ baby)_i = 1|X] = \text{Probit} (\pi_i/1-\pi_i) = \\ &= \Phi (X' \beta) \\ &= \Phi [ \beta_0 + \beta_1 X_{stress\ level} + \beta_2 X_{employment\ status} + \beta_3 X_{age} + \beta_4 X_{education\ level} + \beta_5 X_{dwelling} \\ &+ \beta_6 X_{family\ income} + \beta_7 X_{birth\ place} + \mu_i ] \quad (1) \end{aligned}$$

In the specification above,  $\Phi$  represents the cumulative distribution of probit random variable. The dependent variable for the analysis is whether the mothers in the research sample have sons or daughters. The corresponding question has been asked of each individual in the survey. The individual who answered, "baby boy" to the question is coded as "1", I coded "0" for those individuals who answered "baby girl". Since equation (1) is a probit regression model, the left-hand side of the equation measures the probability of the gender for each participant's child under study.

### 3.2 Measures for the independent variables

For independent variables, I include 7 variables, which are  $X_{\text{stress level}}$ ,  $X_{\text{employment status}}$ ,  $X_{\text{age}}$ ,  $X_{\text{education level}}$ ,  $X_{\text{dwelling type}}$ ,  $X_{\text{family income}}$  and  $X_{\text{birth place}}$ .  $X_{\text{stress level}}$  is a dummy variable for whether the female feel under the pressure during the time period they conceived a child. The individual who answered “yes” is coded as “1”, “0” for otherwise answer.  $X_{\text{employment status}}$  is also a dummy variable for whether the woman was unemployed during the time the baby is conceived. The individual who answered “yes” to the question “whether you are unemployed?” is coded as “1” and the “no” answer is coded as “0”.  $X_{\text{age}}$  is a continuous variable because in the questionnaire, the participants were asked to report their actual age.  $X_{\text{education level}}$  is also a continuous variable. The participants need to report their actual years of schooling by the time they were pregnant.  $X_{\text{dwelling type}}$  is a dummy variable for the question about whether the participant rent or own an apartment when she has the baby. The participant who answer “rent” is coded as “1” and the ones who answer “own” are coded as “0”.  $X_{\text{family income}}$  is another continuous variable since the participants need to report their yearly family income in the questionnaire.  $X_{\text{birth place}}$  is dummy variable to show that whether the birth place of the baby is the mother’s hometown. The individual who answered “yes” is coded as “1”, otherwise is coded as “0”.  $\mu_i$  is the standard error term.

### 4. Probit Regression Results

In this section, I present the multiple Probit regression estimates for the causal effects of the stress level of the mothers on the possibilities of their baby’s agender determination. In column (1) of table 2 below, I present the marginal effects of each covariates from specification (1) to describe the effects of mothers’ anxiety level on their baby’s sex determination. The main variables I am interested in is the dummy variable for whether the expectant mothers are under pressure during the time they conceive their baby. The marginal effect of this variable is 0.1382, which indicates that the mothers who reported that they were under pressure when they conceived their baby are 13.82 percent more likely to have a baby boy. This effect is statistically significant at 2 percent significant level for a two-tail T test.

The other independent variable I focus my attention to is the dummy variable about whether the mother was unemployed when she conceived the baby and the probit regression results show that the marginal effect of unemployment status on the probability of the sex of the baby is 0.0597, which means the women who were unemployed when they were pregnant are about 6 percent more likely to have a baby boy than those who were employed. This effect is also statistically significant at 2 percent significance level for a two-tail T test.

According to the probit regression results, the mother’s conceptional age and education level can also play a statistically significant role on their sex determination of the babies. The results indicate that older mothers are more likely (9.2 percent) to have a baby girl than the younger mothers and this marginal effect is statistically significant at 5% significance level at a two-tail T test. The data analysis also indicates that more educated mothers are more likely to have baby boys and magnitude is about 12 percent more probable to have a baby boy than those less educated mothers.

Moreover, for those mothers who have their children born at the place other than their own hometown have more possibilities (about 6 percent more likely) to have baby boys. We can

reason that as those women who live far away from home are more stressful than those women who live in their own hometown. This marginal effect is statistically significant at 5% significance level for a two-tail T test. However, for the covariates “dwelling type” and “family income”, the regression analysis does not show any statistically significant effect, although the sign of the effect is reasonable.

Table 2: Effects of mothers’ stress level on the probabilities of sex of the babies

	(1)	(2)
Independent Variables	Coefficient (Marginal Effect)	T-Value
Under Stress	0.1382	9.56***
Employment Status	0.0597	13.68***
Conceptional Age	-0.0922	2.56**
Education level	0.1199	1.96*
Dwelling type	0.0077	1.55
Family Income	-0.2746	0.68
Birth place	0.06435	2.01**
Note: *** 2%, ** 5%, * 10% significance level for a two-tail T test		

## 5. Conclusion

By implementing the method of probit multiple regression analysis, I find that there is a statistically significant positive impact of the anxious feeling of mothers on their baby’s sex determination when I use the survey data for the urban China analysis. The impact is about 14 percent with a statistically significance level 2 percent. Other than anxiety level, the mother’s employment status, conceptional age, education level and even whether the birth place of the child is the mother’s hometown are also statistically significant determinant of the baby’s sex. Those mothers who were unemployed during the time they were pregnant are more likely to conceive a baby boy, while those mothers who were employed are about 6 percent less likely to conceive a baby girl. Age also play a role on the baby’s sex determination. Younger mothers have more probabilities (about 9 percent) to conceive a baby boy. Mothers with more years of schooling are also more likely (about 12 percent) to have a baby boy.

Just as most existing literature suggested, the correlation between the personality and some demographic characteristics of the mother and the sex of the embryo has been proved to be significant. And the root cause of this correlation is the levels of testosterone in the womb. Related literature claims that high levels of testosterone in the womb provide a much better environment for the sperm coded to produce boys (Curran, 1992; Grant, 1998). Since the anxiety and stress can cause people’s body system to generate more testosterone, the logical consequence for a mother under this situation will be more likely to conceive a baby boy. This positive correlation between anxiety level and high testosterone can be utilized to interpret the regression results generated by this article. We have reasons to believe that mothers who are more likely to feel that they are under pressure or anxious when they are unemployed, getting old, living far away from home and etc. And therefore, they are more likely to conceive baby boys. Further studies regarding this topic is undertaken and we are expecting to investigate more factors that can possibly affect the sex of babies.

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## **ROLE OF BUSINESS ETHICS IN PROMOTING BUSINESS INTELLIGENCE PRACTICES**

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### **Abstract:**

This article aims to identify the role of business ethics in promoting business intelligence practices in the organization. From this point, this study tries to drive the thinking of economic companies that taking benefits from business intelligence requires to be practiced ethically inside and outside the company. For that, the companies needs to focus on good business intelligence. Therefore, we are trying through this article to clarify the impacts of business ethics on business intelligence in the organization. In addition, among the most important results reached in this article, is that the meaning of business intelligence is the process of understanding and anticipating the competitive environment in which the business operates. Business ethics can be defined as the principles and standards that determine acceptable conduct in business organizations. Moreover, Business ethics can contribute to the good practices of business intelligence by regulating the organizations' operations, and make them exercised in fair manners.

### **Keywords:**

Business, ethics, intelligence, organization.

### **INTRODUCTION:**

Business intelligence is one of the fastest growing disciplines in the world; however, the words conjure up images of trench coats and meetings in back alleys. Unfortunately, recent events only serve to reinforce these fears. Earlier this year, for example, Volkswagen agreed to pay \$100 million to General Motors after the U.S. firm alleged that VW used documents pilfered by an ex-GM executive to its competitive advantage. More recently, Johnson & Johnson and Boehringer Mannheim settled out of court after trading accusations of improper activities, including infiltrating company meetings and taking confidential documents. Even more unsettling to some may be the passage of the Economic Espionage Act in 1996. The law makes it illegal to steal any material that a business has taken "reasonable efforts" to keep secret, and if the material derives its value from not being known. The Act imposes fines of up to \$5 million and 10 years in jail for domestic cases, with greater penalties for cases in which the theft is committed on behalf of a foreign government.

From this point, we can formulate our main question:

**“How can business ethics improve the practices of business intelligence in organization?”**

This main question can be divided into these sub-questions:

- How can we rely on business intelligence ?
- How can we achieve a good business ethics ?
- How can business ethics contribute in supporting and developing business intelligence ?

As pre-answers to these sub-questions:

- Business intelligence is the power of gathering good information about new products and competitors.
- Business ethics means that organizations must do all its business operations legally.
- Business ethics can contribute to the good practices of business intelligence by getting away of theft and bribes, and gathering information legally by Brochures, reports.

This article aims to achieve these goals:

- The identification of the Business intelligence and ethics.
- The exchange of experiences in the field of Business intelligence.
- Showing the importance of Business ethics in the contribution of the good practices of business organizations.

In order to reach the above objectives and test the proposed hypotheses we have divided our article to three sections, the first section highlight on the fundamentals on Business intelligence the second section shows the Business ethics in the business world. The third and the last section points on the contribution of business ethics to the good practices of business intelligence.

**I. Fundamentals on Business intelligence:**

In this section, we are going to highlight the business intelligence, its evolution, its benefits on the business world, and the difference between intelligence and espionage.

**I.1. Definition of business intelligence:**

Business intelligence is the process of understanding and anticipating the competitive environment in which the business operates. All companies who wish to remain successful gather business intelligence in some way and Best Buy is no different. It is our intent to compete aggressively but fairly, with our actions always firmly anchored in our values.<sup>(i)</sup>

**I.2. Evolution of the business intelligence:**

Development of the business intelligence is tightly related to the innovations in the information technology field in general. As mentioned by Biere (2003: 30-41), before 1970s, managers were struggling to access the information they needed for the decision-making process since they were forced to wait for the programming changes and reports. Moreover, it was not possible to access a computer outside of the organization. Thus, all tools for reporting and query were sold to the organizations to be personalized by the IT departments and, thus, required a significant amount of the time and versatile programming skills. However, in the early 1970s some of the vendors started to offer tools which allowed also non-programming users to access and analyze the data. The main disadvantage of those solutions referred to the fact that vendors loaded proprietary data solutions (i.e. data was embedded into the system after the sale and there was no possibility to

implement end-user data afterwards) as the relational databases and, hence, standardized formats to store data have not yet been developed. Such data sources were closed and worked only with that particular vendor's tool; extractions of the data sets were often not synchronized with the customer's actual data; most tools were not able to contain the required data volume; IT specialists were usually required to pull the information from the original data source; these tools required significant investment; consequently the customer could be trapped with the non-efficient tool. However, development of first query-based tools resulted in the learning outcomes (e.g. understanding of how the data should be stored and accessed) and positively influenced on the further development in the field.<sup>(ii)</sup>

The next development milestone was the emergence of so called Information Center (IC) concept in the early 1980s. The idea of such centers was to decrease the lengths of the learning process for query-based reporting systems users (end-users who were standing in between the non-technical users and IT staff) by providing them with the online assistance concerning system's issues. Moreover, ICs also became personal computer (PC) competency centers as the personal computer has just emerged at that time. However, with the development of the spreadsheets, the role of the ICs declined and they have disappeared with time, ruining the settled knowledge centralization in the organizations. The most significant value of these centers was "setting the corporate standards for analysis tools". Due to the fact that IT cost decreased significantly during this period, the impact of the IT systems on the company's performance started to be more visible. In order to make users being more responsible while utilizing the IT systems (especially those which has a significant impact on the organizations' business processes) end-users were charged with users fees when they were processing data, using reporting or maintenance. However, this practice was not eventually successful since the end-users were not willing to pay for utilization of the tools when they are not able to estimate the real impact of their actions towards the performance of the organization.<sup>(iii)</sup>

During late 1980s and early 1990s data processing and manipulation was performed directly in the data warehouse, the access to which was provided to any users. This approach had many negative aspects such as: excess of errors and anomalies in the data which users had to deal with, high complexity and volume of the data since it was pulled from various disparate sources, problem of validating and qualifying of the results, lack of performance etc. However, such practice also brought a positive development and, namely, understanding the need for the metadata. Metadata is the data which is represented by the attributes that describe this data (Turban, 2011: 55) (e.g. metadata for the file can be represented by such attributes as: creation date, author, size of the document etc.). Thus, such development led to several conclusions, such as: all data sources and metadata should be defined, there should be a central repository for users to access the data such as data warehouse or data mart (a more specific repository which is derived from the warehouse to suit end-users needs more specifically).<sup>(iv)</sup>

From the terminological point of view, the actual term of "Business Intelligence" was introduced by the Gartner Group in the mid-1990s as mentioned by Turban et al. (2011: 29). However, based on the above presented information, the idea of the reporting systems already existed in the early 1970s being represented by the static two-dimensional reporting systems grouped as the Management Information Systems (MIS). Later in 1980s another concept named Executive Information Systems (EIS) emerged. These systems were meant as the decision-making support

for the top-level managers and executives. Some of the functions these systems performed include the following: dynamic multidimensional ad hoc or on-demand reporting, forecasting and predictions, drill down to details, trend analysis, status access, critical success factors (CSFs). After mid-1990s, with addition of some new features, commercial products which offered functions mentioned above appear under a common name of business intelligence. Thus, from the conceptual prospective, EIS transformed into BI. As pointed out further by the author, by 2005, BI started to include also artificial intelligence capabilities meant to facilitate the decision-making process as well as powerful analytical features.<sup>(v)</sup>

### **I.3. Benefits of Business Intelligence:**

According to Thomas Jr. (2001) “BI is both an offensive and defensive system”. It provides a better understanding of the competitive environment and at the same time acts as a protection for intellectual property. Gibson et al. (2004) group benefits of BI into tangibles (e.g. Return on Investment and Cost savings) and intangibles (e.g. better information, better strategies, better tactics and decisions, and more efficient processes). They further argue that the intangibles benefit out-weighs the tangibles, since BI falls under IT, where its benefits cannot be clearly identified. BI has lots of influence on strategic activities and where traditional evaluation techniques are applied in respect to projects with strategic benefits, success rates is very low. As users advance in skills of BI tools, such users can e.g. be very instrumental in making strategic decisions, for instance, for the organization not to pursue a particular market group; the level of BI benefit here is global in scope and not so obvious to identify and measure. Tools in BI enable possibilities for users to rapidly discover information to queries relating to their work. Timely answers to business questions, improve operational efficiency, eliminate report backlog and delays, negotiate better contracts with suppliers and customers, find root causes and take action, identify wasted resources and reduce inventory costs, leverage your investment in your ERP or data warehouse, improve strategies with better marketing analysis, empower sales force, provide quick answers to user questions and challenge assumptions with factual information, are some of the benefits to be gained from BI implementation.<sup>(vi)</sup>

### **I.4. Difference between intelligence & espionage:**

The organization known as Strategic and Competitive Intelligence Professionals (SCIP) makes it clear that the primary difference between intelligence and espionage is that “intelligence is the process of legally and ethically gathering and analyzing information about competitors”. From that, it can be argued that espionage represents a failure to abide by these rules. That is to say, if the information in question is gathered in an illegal or unethical way, the gatherer of the information has committed an act of espionage.

The question of when intelligence becomes espionage is further elaborated upon in an article by Crane (2005), in which he attempts to determine “at what point does legitimate competitive intelligence gathering cross the line into industrial espionage”.

He argues that, ethically speaking, an act of intelligence can be considered an act of espionage, if it is found that: the nature of the information gathered can be considered as confidential, the tactics used go beyond what is deemed acceptable, or the information was gained with the purpose of being used against the public interest. His argument neatly captures three of the areas in which a LIS professional could face ethical struggles in intelligence work. The first area

relates to questions of how far -by what methods or nature-one should go to gather data. The second area relates to problems stemming from the ambiguity of what is acceptable.

The third area relates to issues around whose interests are being served and what future problems may arise there from.<sup>(vii)</sup>

## **II. Business Ethics in a business world**

In this section, we will highlight on the definition of business ethics, its importance, and the acceptable and Unacceptable sources of Informations.

### **II.1. Definition of business ethics:**

Business ethics can be defined as the principles and standards that determine acceptable conduct in business organizations. The acceptability of behaviour in business is determined by customers, competitors, government regulators, interest groups, and the public, as well as each individual's personal moral principles and values.<sup>(viii)</sup>

### **II.2. Importance of Ethics:**

Business intelligence practitioners are beginning to develop more explicit standards. For example, the SCIP Code of Ethics (printed at the front of every issue of CIR) exhorts members to maintain the highest degree of professionalism and to avoid unethical practices; to comply with all applicable laws; to adhere to their own companies' practices, objectives, and guidelines; to identify themselves and their organization prior to interviews; and to respect requests for confidentiality. However, these guidelines are somewhat general and don't provide a beginning practitioner with the specific guidance needed to make decisions in ethically ambiguous situations. For example, what should a SCIP member do when the law provides insufficient guidance or when his or her company seems to encourage unethical conduct? As the profession continues to grow, its challenge will be to develop consensus about acceptable and unacceptable Business intelligence practice.<sup>(ix)</sup>

### **II.3. Acceptable and Unacceptable sources of Informations:**

Most of the factual information required for successful intelligence analysis can be found in the "public domain." A key role you can perform is to assist in gathering this publicly available information; sources that you may find useful include (but are not limited to):<sup>(x)</sup>

- Published materials – e.g. local newspapers and press accounts.
- Public filings – zoning, building permits, litigation, etc.
- Financial documents, such as competitor company annual reports.
- Published financial information and broker reports.
- Brochures, reports, other information published by or about competitors that can be collected at trade shows, exhibits, etc.
- Published market surveys and consultant reports.

Illegal activities should not be pursued under any circumstances. Examples of such actions include (but are not limited to):<sup>(xi)</sup>

- Theft (tangible or intangible property).
- Bribery.
- Blackmail.
- Trespassing.

- Wiretapping.
- Receiving stolen property.
- Clandestine recording.
- Eavesdropping.
- Misappropriation of intellectual property.
- Extortion.
- Price fixing.
- Market allocations of products or territories.
- Illegal boycotts.
- Bid rigging.

### **III. Practicing Business intelligence ethically:**

In this section, we will highlight on how companies actually collect Business intelligence, the ethics of business intelligence, and the impact of ethics on Business intelligence.

#### **III.1. Collection of business intelligence:**

The lifeline of effective strategic planning is the infusion of high quality competitive information. To insure such quality, experts recommend that companies develop alternative intelligence sources, scan multiple aspects of the environment, and sensitize employees to the necessity of intelligence gathering. How do companies actually collect competitive intelligence? There is more speculation than documentation about the vast amounts that are being spent on tactics ranging from electronic eavesdropping to encouraging loose talking executives. The few systematic studies available have been conducted by the American Marketing Association and have been limited to traditional marketing research activities. There is also a surprising lack of information on the attitudes of the company personnel who have been identified as the key sources for gathering intelligence. Again research has been confined to measuring marketing researchers' and marketing research executives' attitudes towards specific marketing research activities, especially as they impact on their or on the rights of the consumers or experimental subjects being studied.<sup>(xii)</sup>

#### **III.2. The ethics of business intelligence:**

The question of whether or not the conduct of activities relating to business intelligence is ethical is really composed of two parts. First, there is the broad question of whether or not the collection and use of business intelligence is an ethical practice. If we come to the conclusion that this "end" is acceptable, then we have to deal with the question of the means. This second question examines which of the specific methods of collection and use of business intelligence are allowable and which methods are not. Contrary to the opinion that business is an amoral activity (i.e., that it is devoid of any ethical or moral dimension), we believe that business ethics is a viable and necessary field of study. Business, just as any field of human endeavor, is a human activity and, therefore, has a moral dimension. However, unlike other human activities that are founded on the central motive of love or charity toward one's fellow human, the primary motive behind business is profit. Ethicists and moralists have pronounced this motivation as being acceptable in the eyes of God and man. Some apologists for capitalism have even called the concepts of profit and individual success divinely inspired by an invisible hand that governs the actions of every rational economic man, to the benefit of society as a whole. To profit from one's business dealings is not, in itself, unethical. While one might judge this motivation to be base, it

cannot be said that it is immoral or amoral. Profit as an end is perfectly acceptable to most; however, the means to attain that goal can be a problem. The judgement as to whether or not an action is ethical should be made within the moral framework of the business environment. The purpose of business intelligence is to help managers assess their competition, their vendors, their customers, and the business and technological environment. This allows the managers to avoid surprises, forecast changes in business relationships, identify opportunities, predict a competitor's strategy and develop a successful business plan. All of these motives are aimed at making a business more effective and efficient, hence more profitable. That added efficiency benefits not only the owner but society as a whole. We are not aware of any framework for evaluating business ethics which would call either these motives or these results immoral or which would prohibit the collection or use of business intelligence.<sup>(xiii)</sup>

### **III.3. Impact of ethics on Business intelligence:**

Legal and ethical guidelines are the ground rules that all employees must follow in carrying out their business intelligence duties, be that speaking with suppliers, customers, or even direct competitors. Whatever form the guidelines take, they must reflect and reinforce your company's corporate ethical guidelines—with added specificity about intelligence activities. Clients of the Futures Group have spanned the range in terms of how detailed they make their guidelines—from a simple statement of the company's commitment to the highest ethical standards to a multi-page document of specific guidelines and examples that leave little doubt in the reader's mind about what is and is not permitted. Whatever method you choose, it is critical that the guidelines mirror the ethical culture of the organization.<sup>(xiv)</sup>

What's the best way to institute such guidelines? Perhaps the most critical element is the support of top management. This ensures two things: that the guidelines will be followed and enforced and that they are seen to apply to all employees, not just those in the intelligence unit. Any guidelines that lack top management's support will soon be forgotten or ignored.

Secondly, it is crucial to enlist the help of your company's legal department early on. Just the mention of business intelligence can give some lawyers the shakes, conjuring up a host of fears and misconceptions. Meeting with your lawyers early will allow you to fend off these misconceptions and gain your attorneys' input before you begin drafting the parameters. In return, by engaging the legal department you can help elevate the status of the intelligence unit. If your guidelines are "blessed" at the corporate level, a clear signal is sent that the intelligence unit is an integral part of the organization that's here to stay. Too, you can begin to forge a valuable relationship between your company's intelligence and legal units, which often have information of value to each other. Corporate lawyers often know first about pending legislation or regulatory issues that could affect company strategy. For its part, the intelligence unit can often provide early warning of potential takeovers, as well as input on mergers and acquisitions and anti-dumping cases.<sup>(xv)</sup>

Third, the guidelines should be introduced with a short training program. It's important that everyone know the limits of legitimate business intelligence from the outset. Equally important, the guidelines should not frighten employees into ignoring the valuable information they come across daily. A short training program can help strike this balance. In it, there should be a discussion of the inevitable gray areas employees may encounter. What is a salesperson to do for

example, if a contact volunteers a document from your competitor that is clearly proprietary and reveals some valuable insights? The answer to this will vary by firm, and it is important that your employees recognize the potential for such situations. It's important at this point therefore, to give your employees a single point of contact to call if they have questions or concerns. This person could be in the legal or security department, but it's best to designate only one contact point to avoid confusion.<sup>(xvi)</sup>

In order to practice business intelligence ethically organizations should not spy on other competitive organizations, should not stole others' ideas, should not use illegal methods like piracy in order to collect informations, but, it has to hire competent employees, making good relations with clients, so if it want to collect informations from them, they will be happy to help and not forget the changes that happens in environment.

### **CONCLUSION:**

Intelligence is steadily making its way in the business world, combining business processes, technology and best practices to offer managers insights that guides strategic decision-making based on the accumulated data. Though expensive and needs ample time to implement and matures, its improved decision-making, helps reduce cost and identify new business opportunities. Organizations, whose operations results in the large accumulation of data and needs better understanding of the past, present and to influence future decision-making are adopting BI systems.

In this article, we derived to these results:

- Business intelligence is the process of understanding and anticipating the competitive environment in which the business operates.
- Business ethics can be defined as the principles and standards that determine acceptable conduct in business organizations.
- Business ethics can contribute to the good practices of business intelligence by regulating the organizations' operations, and make them exercised in fair manners.

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