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Aims and Scope:

Changing Societies & Personalities is an international, peer-reviewed quarterly journal, published in English by the Ural Federal University. *CS&P* examines how rapid societal-level changes are reshaping individual-level beliefs, motivations and values – and how these individual-level changes in turn are reshaping societies. The interplay of personality traits and sociocultural factors in defining motivation, deliberation, action and reflection of individuals requires a combination of theoretical and empirical knowledge. Since an interdisciplinary approach is needed to understand the causes and consequences of the contemporary world's changing socio-political institutions, moral values, and religious beliefs, the journal welcomes theoretical and empirical contributions from a wide range of perspectives in the context of value pluralism and social heterogeneity of (post)modern society.

Topics of interest include, but are not limited to

- value implications of interactions between socio-political transformations and personal self-identity;
- changes in value orientations, materialist and post-materialist values;
- moral reasoning and behavior;
- variability and continuity in the election of styles of moral regime and/or religious identity;
- the moral bases of political preferences and their elimination;
- social exclusion and inclusion;
- post-secular religious individualism;
- tolerance and merely "tolerating": their meanings, varieties and fundamental bases;
- ideologies of gender and age as variables in political, moral, religious and social change;
- educational strategies as training for specific social competences;
- social and existential security.

The journal publishes original research articles, forum discussions, review articles and book reviews.

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EDITORIAL

The Transformation of Values in the Times of Uncertainty

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The current issue of *Changing Societies & Personalities* continues its main thematic thread—reflection upon value transformations in various socio-cultural contexts. The keyword that may characterize the entire issue is uncertainty. On the one hand, uncertainty inevitably follows any transformation. On the other, the COVID-19 pandemic, which is analyzed in several articles from different perspectives, is far more than a health crisis. COVID-19 is affecting societies at their core by changing the habitual way of life, and its long-term impacts are hidden in the fog of the future. The pandemic will end sooner or later, but uncertainty will remain. From big things to small, from philosophical concepts to everyday feelings, being uncertain means that people and societies are alive.

Revealing the historical roots of post-colonial thought, Konstantin D. Bugrov (Yekaterinburg, Russia) begins his article *Colonial Revolution and Liberatory War: from Communist to Post-Colonial Theory (Georgy Safarov, Mao Zedong and Frantz Fanon)* by mentioning Vladimir Lenin's justification of a national liberation war even if it is a war of a colonial semi-feudal state against a well-developed imperialist state. Lenin's idea was followed by the Communist International (*Comintern*), which in 1920 proclaimed the possibility of a direct transition of colonies to socialism. Bugrov outlines three key tendencies of the Communist thought developed in the 20th century, which had an impact on the further development of the colonial (and post-colonial) agenda: the intellectual legacy of Antonio Gramsci; the Orthodox Leninist thought represented by different types of the USSR-inspired communist movements across the world; and some radical interpretations of the resolutions of the 2nd *Comintern* Congress. The article explores the concepts of three political figures: Georgy Safarov who, as Bugrov argues, arranged a set of rather unsystematic *Bolshevik/Comintern* ideas on colonial revolution into a theory of anti-colonial peasant war; Mao Zedong who insisted on achieving national independence by means of war rather than

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by overcoming economic backwardness; and Franz Fanon who developed a theory of revolution in Africa and considered colonial dependence not only as a system of subjugation, which permanently reproduces backwardness, but mostly as a psychological trauma. Bugrov explores both similarities and differences between the three trends in the shift from the Communist to post-colonial paradigm of thinking.

Oksana V. Golovashina (Yekaterinburg, Russia) in the article *Battles for Bandera: Dissonant Historical Narratives of Ukrainians in Poland and Problems of Integration*, stresses that today's interpretation of history has more than ever moved from the hands of professional intellectuals to become an object of everyday personal experience and collective interpretation. In conflicting situations, which arise between personal experiences and official interpretations, "the ensuing combinations reveal often paradoxical interrelationships between collective representations and the influence of official discourses on them". In the post-socialist countries, where collective representations of the past that were constructed under the influence of a socialist discursive model, the conflict of interpretations becomes quite passionate. Golovashina analyzes the increasing flux of Ukrainian migrants into Poland and examines Polish and Ukrainian historical narratives. In particular, she focuses on a new pantheon of Ukrainian national heroes, some of whom are viewed quite negatively by many Poles, according to the field research of Ukrainian migrants conducted between October and November 2017 in the Polish cities of Warsaw, Krakow and Poznan. The article analyzes historical narratives in the context of intensive exchanges between Ukrainians and Poles along with an examination of methods for reconciling the conflict potential of national histories.

As Michal Müller (Olomouc, the Czech Republic) notes in the article *The Value of Work-Related Uncertainty: Changes from Demands on Certainty to Finding Ways of Living in Uncertainty,* work and uncertainty are two important objects of sociological research that have a philosophical overlap. Presently, according to Müller, "it turns out that society is transitioning from excessive adherence to certainty, caused by negative experience during the early form of capitalism, to finding ways to live in uncertainty". Firstly, uncertainty is introduced in the context of risk as a related phenomenon because modernization and technological development increases uncertainty in the labor market. At the same time, uncertainty and risk might be understood as a price to pay for democracy, which is related to the uncertain nature of capitalist society. Then Müller discusses the positive role of uncertainty at the level of the state, entrepreneurship, and employment. He points out that "it is precisely the uncertainty that leads entrepreneurs to modify individual relationships and seek new, better solutions to current situations". Finally, Müller shows that the very theme of uncertainty becomes relevant more than ever in the context of the current COVID-19 pandemic, which seems to be the greatest reminder of uncertainty in the modern history, and forces to reflect upon its consequences, both negative and positive. Müller concludes that, on the one hand, uncertainty "associated with work, whether at the level of social structure, individual entrepreneurial activities, or employment, is a significant value, if it does not take extreme forms". On the other, freedom as a responsibility for individual actions is possible only in the context of uncertainty.

The analysis of the new reality of COVID-19 is continued by Sanja Bizilj, Eva Boštjančič, and Gregor Sočan (Ljubljana, Slovenia) in the article *Perceived Efficacy of Virtual Leadership in the Crisis of the COVID-19 Pandemic*. In many countries, strict measures were introduced in order to limit interpersonal contacts and thus control the infection. Under such circumstances, virtual leadership becomes one of the most important challenges faced by entrepreneurship, since a lack of personal contacts with employees could cause difficulties in monitoring work performance and resolving conflicts. The article aims to answer the following research question: "Do digital communication skills affect the perception of leadership efficacy when transferring to remote work in the context of COVID-19?" The research focuses on the leaders of those organizations that allowed the staff to work from home. The authors note that the research is "based on the social cognitive theory and the concept of efficacy from the point of view of both self-perception (self-efficacy) and that of the environment (efficacy)". In addition, the importance of digital communication skills for effective virtual leadership is demonstrated.

Irina M. Kyshtymova, Lidia V. Matveeva, and Anastasia A. Deineko (Irkutsk and Moscow, Russia) explore current attitudes toward the image of the mother, which is increasingly formed "not only via direct mother-child communication, but is also mediated by media narratives." In the article *Cartoon Image of the Mother, Its Perception by Elementary School Students and Correction in the Process of Media Education*, the authors point out that the overwhelming presence of various media forms exposes children to not only children's content—first of all, cartoons—but also commercials, news programs, talk shows, and other information addressed to adults; which is why the impact of media products, cartoons in particular, on children's development and behavior is a promising research direction. The aim of the article was "a psychological analysis of cartoons displaying different images of the mother in order to theoretically substantiate and empirically test their influence on the perception of the mother by younger schoolchildren". The authors stress the need to develop effective algorithms for the psychological analysis of media content in order to estimate its role in the formation of a child's personality and their attitude toward significant others.

In the article *The Efficacy of a Holding Community Program—Promoting Social Reflection at School*, Anna Siegler, Sára Serdült, Fanni Csernus, Lilla Dézma, Izabella Ilea, and Sára Bigazzi (Pécs, Hungary) mention that, from their perspective, Hungarian public education focuses primarily on the development of cognitive rather than social and emotional areas. However, the contemporary philosophy of educational systems in many countries presupposes the importance of social cohesion and active citizenship, which requires cultivation of positive relationships and reciprocity between school students. The authors present a concept of holding environment; it is based on the methodology of conflict resolution, intergroup dialogue, socio-emotional competence development, prejudice reduction, and human rights education. The authors insist that enabling students to be reflective means making them active shapers of society "not by the absorption of ready-made knowledge or the compliance with rules, but through dialogue." The article evaluates

the effectiveness of the proposed Holding Community Program in developing perspective-taking, reducing prejudice, and promoting active participation.

Jamaluddin Hos, Ambo Upe, Muhammad Arsyad, and Hasniah (Kendri, Indonesia) in the article *Time Allocation and Economic Contribution of Women in Fulfilling the Basic Needs of Poor Households* explore poverty as one of the most significant problems in developing and underdeveloped countries, including Indonesia. Special attention is paid to women who play an essential role in sustaining the economic resilience of poor households. The authors study the case of women's labor in stone-breaking companies, which involves producing building materials for mixed cement cast. They stress that "women's involvement in stone-breaking activities that are included in heavy and abusive work certainly has a subjective motivation known as background. Limited access to decent work with a fair wage has forced housewives to undergo heavy and rough activities such as stone-breaking… Furthermore, in most cases, woman join this occupation to support their husbands' income to meet families' needs". The research is based on the data collected through in-depth interviews with 25 informants. The results show that, although stone breaking is a heavy work, women allocate sufficient time to taking care of their households. At the same time, the economic contribution of women to sustaining the existence of their families is quite significant.

As Olga V. Kruzhkova, Irina A. Simonova, Anastasia O. Ljovkina, and Marina S. Krivoshchekova (Yekaterinburg and Tyumen, Russia) state in the article *Vandal Practices as a Psychological Response to the COVID-19 Pandemic*, the pandemic situation is completely new to the contemporary world and may elicit a strong emotional response in people both at the level of individual reaction and collective experience. Transformation of people's emotional states caused by quarantine restrictions, which significantly reduce social activities, changes routine actions and may trigger destructive criminal activities. At the same time, the accumulated feelings of fear, anxiety, and helplessness "force people to seek solutions to a difficult situation at any cost". The authors aim to classify vandal practices as a response of people, groups, and society to a global threat caused by the COVID-19 pandemic. This social tension is often translated into protests and vandal actions. The authors consider vandalism as "an individual impact on the objects of urban environment which is revealed through changing their current state without appropriate sanctions from the other entity that has legal rights to these objects (its owner or manager)". In the article, 80 cases of vandal actions are analyzed, and vandal actions are classified.

Irina G. Polyakova (Yekaterinburg, Russia) in the article *Informal Sperm Donation in Russia* notices that Assisted Reproductive Technologies (ART) are becoming more popular and accessible. Society is becoming receptive to assisted reproduction, and sperm donation is one of the most widely used and well-known ART. Recently, practices of informal sperm donation, along with those conducted in formal settings (in fertility clinics and similar institutions), have seen a growing demand in Russia. A factor contributing to this demand is undoubtedly the Internet as digital platforms facilitating donor-recipient interactions provide a fast and cheap access to this service. Nevertheless, informal sperm donation remains a relatively new phenomenon, which

remains underexplored in Russian research literature. The article discusses the informal practices of online sperm donation in Russia, focusing on donors' perceptions of the process, motivations, and expectations concerning potential recipients, as well as their evaluations of donor-recipient relationships, and taking into account that donors invest significant time and resources in their activity. The study is based on interviews with 11 men aged 28–53 from the perspective of symbolic interactionism as the most productive theoretical approach in this respect. Polyakova concludes that "the emergence of online platforms offering sperm donor matching services enables donors and recipients to dodge the rules of fertility clinics", at the same time as raising a number of ethical and legal concerns.

A forest as a classical locale of traditional culture among the Yorùbá people of southwestern Nigeria, which constitutes about 18% of Nigeria's population, is the focus of a research study undertaken by Fausat Motunrayo Ibrahim, Benson Osikabor, Bolanle Tawakalitu Olatunji, Grace Oluwatobi Ogunwale and Olawale Julius Aluko (Ibadan, Oyo State, Nigeria). The Yorùbá strongly believe that there is an interface of the visible and invisible, the tangible and intangible, and regard those human beings are on a perpetual journey between *ayé* (the world) and *ọrun* (heaven) where "the world is perceived as a market place whereas heaven is man's real home". In the article *Forest in the Context of Social Change: Traditional Orientation and Forest Mystification in a Nigerian Forest-Reserve Setting,* the authors take into account the complexity and interconnectedness of various elements of traditional forest mystification in the Yorùbá social context. Forest mystification as a marker of the relationship between the individual and society is examined along with other indicators of traditional orientation including attitudes toward religion, ageing, gender, and cultural enthusiasm. The article studies the correlations between each element of this model and forest mystification.

The BOOK REVIEW section contains the review by Andrey S. Menshikov of Daria Dubovka's book (2020) *V monastyr' s mirom. V poiskakh svetskikh kornei sovremennoi dukhovnosti* [To the Monastery in Peace: Searching for Secular Origins of Contemporary Spirituality]. The reviewer analyzes the specifics of the author's approach toward what it means to be a devout Orthodox Christian today.

Discussions around the topics raised in the present issue will be continued in the subsequent issues of our journal. In planning to introduce new interesting themes, we welcome suggestions from our readers and prospective authors for thematic issues, debate sections or book reviews.

For more information, please visit our journal web-site: https://changing-sp.com/

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ARTICLE

Colonial Revolution and Liberatory War: from Communist to Post-Colonial Theory (Georgy Safarov, Mao Zedong and Frantz Fanon)

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ABSTRACT
The article investigates the intellectual roots of the concept of colonial revolution, which goes back to the 2nd congress of the Communist International, examines its importance in shaping the Communist political thought and outlines its subsequent transformation in the wake of post-colonial theory. The author starts with analyzing the political ideas of Georgy Safarov—*Comintern* [the Communist International] theorist. He was among the most original thinkers who elaborated the concept of colonial revolution. Safarov, drawing from his own experience in Central Asia, insisted that global capitalism is "retreating to the positions of feudalism" while operating in colonies, treating them as collective "serfs" and lacking any proper social basis save for its own enormous military force. Such analogy led Safarov to envisage the colonial revolution as a "plebeian" revolt and liberatory war against the inhumane and stagnant colonial order, opening the way for a non-capitalist development with certain assistance from the Soviet Union. Similar ideas were independently formulated by Mao Zedong in the 1930s. He saw colonial revolution in China as a "protracted war" of liberation and listed the conditions under which victory was possible. However, the subsequent development of a former colony was seen by Mao as a transitory period of "democratic dictatorship". Similar ideas of colonial revolution as a liberatory peasant war and "plebeian" movement were developed by Franz Fanon in the context of his own war experience in Algeria. Developing the idea of "plebeian", peasant revolt and justifying the violence as the sole means of ending the rule of colonial power, Fanon at the same time differed from the tradition

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of the 2nd *Comintern* Congress (represented by Safarov, Mao and the others) while describing the independent existence of former colonies. For Fanon, the worst consequence of colonial rule is not permanent backwardness but psychological trauma, an inevitable result of a brutal conquest which requires therapy. The author concludes that such conceptual transformation was stimulated not merely by the disappointment in Soviet and Chinese economic strategies, but also in the geographical and cultural factor which made the reintegration with the former colonial powers preferable to the direct "escape" into the socialist camp.

KEYWORDS
colonial revolution; post-colonial studies; liberatory war; Georgy Safarov; Mao Zedong; Frantz Fanon

Introduction

The relationship between Marxism and post-colonial intellectual paradigms was scrutinized many times (Moore-Gilbert, 2001; Wolfe, 1997). Of course, Marxism historically had many faces, and one of them was especially preoccupied with the colonial problematics based on the intellectual legacy of the Communist International and, speaking more broadly, the Communist thought. After the beginning of the First World War, the radical wing of Russian Socialist Democracy party (Bolsheviks) was consolidated around Vladimir Lenin in the anti-war, defeatist stance; Nikolay Bukharin was among the first who postulated that the military domination of developed Western countries in the colonies is unable to move the colonies forward in a violent but progressive way. At the same time, Lenin criticized Rosa Luxemburg, who thought that, besides revolutions, the era of imperialism cannot produce liberatory wars. To develop his arguments, Lenin together with Grigory Zinoviev published *Socialism and War* (1915/1931), where two types of just wars were defined: revolutionary wars (in respective periods of history, bourgeois states against feudal states, and proletarian states against bourgeois states) and national-liberatory wars; thus, even the war of colonial semi-feudal states against developed imperialist states could be justified:

> If tomorrow, Morocco were to declare war on France, India on England, Persia or China on Russia, and so forth, those would be "just", "defensive" wars, irrespective of who attacked first; and every Socialist would sympathize with the victory of the oppressed, dependent, unequal states against the oppressing, slave-owning, predatory "great" powers. (Zinoviev & Lenin, 1915/1931, p. 5)

It was Lenin who developed "classical Marxist heritage on the national and colonial question" (White, 1976, p. 173). The Russian Revolution of 1917 and the political success of the Leninist strategy which called for an unconventional support

of national-liberatory movements eventually solidified the positions of such ideology and provided the basis for a political experiment, which historian Terry Martin called an "affirmative action empire" (Martin, 2001, p. 1).

The foundation of the Communist International (*Comintern*) finally formed the Communist perspective on the colonial question: the key formula of the 2nd Congress of the *Comintern* (1920) was the possibility of direct transition to socialism in colonies. As Grigory Zinoviev, one of the leaders of the Bolshevik Party, stated in 1920, from the moment of the revolution in Russia, "we can say that China, India, Turkey, Persia, Armenia can and ought also to begin the struggle directly for a socialist order" (White, 1976, pp. 180–181). There were considerable disagreements regarding the political and social strategy of the colonial revolution. Lenin insisted that the Communist movement in colonies might rely upon the alliance with "bourgeois-democratic liberation movements", while Indian communist Manabendra Roy argued that support has to be reserved only for "revolutionary movements of liberation" (Haithcox, 1971, p. 11). Indeed,

> anticolonialism was a diasporic production, a revolutionary mixture of the indigenous and the cosmopolitan, of situated local knowledges combined with universal political principles, constructed through international networks of party organizations, political contacts between different revolutionary organizations, and personal contacts between activists, generating common practical information with political and intellectual influences. (Young, 2003, p. 7)

Through the 1920s, the *Comintern* was engulfed in disputes on different aspects of the colonial revolution, spurred by the revolutionary events of the second half of the 1920s in China.

Post-colonial theory is often seen as a product of disappointment in the whole socialist and revolutionary project, strengthened by the demise of planned economy both in the USSR and China. When "uncertainty reigned as to what would follow in the wake of socialism" (Mueller, 2019, pp. 533–534), the attractivity of Communism *per se* fell. Communist ideas remained among the intellectual sources of post-colonial theory. The key post-colonial thinkers like Gayatri Spivak not just readily used Marxist concepts and ideas, but also referred to Lenin, thus provoking harsh critique from figures like Neil Lazarus and Aijaz Ahmad, who were attacking post-colonial agenda as a sort of post-modernist attack over "universalism, rationalism and secularism" (Ahmad, 2011, p. 37), which was highly valued by classical Marxism. Another source of discontent is post-colonial theory's emphasis on culture rather than economy. For instance, Benita Parry, inspired by Leo Trotsky's ideas on "combined and uneven development", criticized Gayatri Spivak and other prominent figures from the field of subaltern studies:

> It is now impossible to overlook a strong impulse in the contemporary postcolonial discussion to find a middle ground between the terms "domination" and "oppression", to define colonial relationships as generically ambivalent, and

> to represent colonial locations as always and necessarily the site of dialogue. A tendency to privilege the cultural assimilation sought and achieved by colonial elites over popular resistance to colonial violence is both ahistorical and morally vacant in its detachment from the outrages visited on the dispossessed. (Parry, 2002, p. 144)

Or, as some contemporary Marxist critics of post-colonial agenda put it, "exploitation cannot be transformed by producing alternative representations or interpretations" (Scatamburlo-D'Annibale et al., 2018, p. 153).

This article focuses on the history of an important concept that emerged within the vast intellectual heritage of the *Comintern*—the concept of colonial revolution. Such historical inquiry allows us not only to learn better the origins and genesis of the intellectual framework within which the colonial system was dismantled, but also to uncover some of the historical roots of the post-colonial thought, and to provide an explanation of its break with the revolutionary and Communist thought as it was developed by Lenin and the 2nd *Comintern* Congress. To proceed with the analysis, we must make one more important distinction between different traditions in the Communist thought. We may roughly outline three key lines in which loosely understood Communism influenced the theories and ideas about the colonial revolution and subsequent independent development of former colonies.

The first tradition could be referred to as *hegemonist* and is based upon the intellectual legacy of Antonio Gramsci. Even though Gramsci himself did not pay special attention to the problem of colonial revolution (he actually saw Italy in terms of colonial subjugation, as industrially developed North commanding the peasant South), his reflection on the reciprocal and complex character of political power, described within the concept of hegemony, proved to be quite valuable to describe the experience of colonial rule as well. The Gramscian notion of hegemony heavily influenced post-colonial studies in Asia and Latin America, and, although the source of Marxist influence in Indian subaltern studies were Edward Thompson and Victor Kiernan, it was Gramsci who emerged by the late 1980s as one of the key names of the new intellectual current (Brennan, 2001, pp. 150–152). Gramsci was also interpreted in non-Marxist contexts, for example, in the writings of Norberto Bobbio. Still, Gramsci belongs to the Communist tradition; Gramscianism could be considered an intellectual apology for the inability to wrestle the power by means of revolt; rather, it gave preference to a "long march" in order to culturally overweight capitalism. By the end of the 20th century, and with the influential additions by authors like Ernesto Laclau and Chantal Mouffe, these broadly understood Gramscian ideas became a dominant force in the European left.

The second is the Orthodox Leninist thought represented by different types of the USSR-inspired communist movements across the world, especially in the intellectual production of the different wings of the ruling Communist party in the USSR. Being definitely sympathetic to the "wretched of the Earth", this version of Communism was always ready to turn to them by its other side, namely, the cold and cynical Machiavellian calculation of (economic) power. A follower of Leo Trotsky,

American communist Ted Grant stated in 1964: "The idea of leaning on the peasant masses, of the 'revolutionary elements with nothing to lose' and of the lumpen proletariat as a revolutionary force, superior to the 'respectable industrial proletariat' which has a higher standard of living, as the decisive force in the revolution, is the idea of Bakunin and not of Marx or Trotsky" (Grant, 1964).

While Trotskyism generally dismissed the peasant movements in colonies, its stance was paradoxically close to the intellectual positions of the official Moscow, the self-proclaimed death enemy of Trotskyism: an arrogant idea of superiority based on its economic strength. The psychological problems in dealing with Moscow are summarized in Enver Hodzha's diatribes against "khruschevites": he was blaming the Soviet leaders for their arrogant behavior and disdain for Albania's needs. The economic advice from Moscow were seen by Hodzha as an attempt to humiliate the underdeveloped countries:

> You are not exact in your planning. The hydro-power station is costing you an enormous amount and you won't know what to do with the current. Likewise, you have planned to build unnecessary factories, like those for steel, timber-processing, paper, glass, linseed, bread, etc. Does Albania need all these factories? Why are you building the refinery? The question of agriculture is critical, therefore reduce your investments in industry and strengthen agriculture! (Hoxha, 1980, pp. 70–71)

Indeed, the political program of Bolshevism in the 1920s shifted to the ambitious task of economic rivalry with the capitalism, which the Soviet state pursued with certain, if limited, success. There Communism as a science of political-economic domination risked being dissolved in the general stream of modernization theories. Immanuel Wallerstein remarked: "We could say that the Stalinist version of the theory of stages simply changed what state represented the model: the Soviet Union became the model state instead of Great Britain. But the idea that there was a model, and that each state must follow more or less parallel routes, was epistemologically the same, notwithstanding the political difference" (Stame & Meldolesi, 2019).

And even though former colonies were seen by Red Moscow with sympathy in their anti-imperialist struggle, they were treated as inferior in terms of technological and industrial development, way behind the unparalleled Soviet power; the understanding of colonial revolutions was deployed to mark the difference between developed (that is, both capitalist and socialist) and undeveloped countries.

The third tradition emerged from the more radical understanding of the resolutions of the 2nd *Comintern* Congress by the authors especially interested in discovering the condition under which the success of revolution in a colony would depend primarily upon the actual political and military qualifications of the revolutionary movement itself. As Laclau and Mouffe emphasized, the key moment in the transformation of the Leninist paradigm of Marxism came when it encountered the endless variety of peripheral popular movements:

> While implicitly retaining the notion of hegemony as a merely external alliance of classes, the new strategy conceived democracy as a common ground which was not open to exclusive absorption by any one social sector. A number of formulas—ranging from Mao's "new democracy" to Togliatti's "progressive democracy" and "national tasks of the working class"—attempted to locate themselves on a terrain that was difficult to define theoretically within Marxist parameters, since the "popular" and the "democratic" were tangible realities at the level of the mass struggle but could not be ascribed to a strict class belonging […] From China to Vietnam or Cuba, the popular mass identity was other and broader than class identity. (Laclau & Mouffe, 1985, p. 62)

The encounter happened exactly on the premises of the *Comintern*, but there was a serious difference between Mao and Togliatti. In Italy, the Communist Party operated as a legal force aimed at political struggle, in terms of either the Leninist struggle for power or Gramscian "long march" for hegemony, while in China the Party was engaged in the war against the foreign occupation. This national-liberatory momentum was downplayed or even missing in both Leninist and Gramscian visions of Marxist political philosophy, but for the colonies it was the most important part. The complex interaction of "class" and "mass" in the context of liberatory struggle was the intellectual focal point where the Marxism went colonial and, subsequently, post-colonial. It was associated with the violent movements within the New Communism, and typically, this intellectual current is characterized as distinctly critical towards both European Socialist Democracy and the Soviet model of Leninism. There were debates in Latin America between the *foquistas* or *guevaristas* and their fewer radical opponents like Vania Bambirra in relation to how exactly organize a rebellion (Briceno Ramirez, 2016). The ideas of "urban guerilla" and other radical concepts of partisan war might be seen as by-products of this tradition. It was the tradition which frightened Carl Schmitt to such an extent that he devoted a full-scope study, *Theory of the Partisan* (2007), to the attack on this tradition, which he saw as the biggest threat to the international order. Indeed, it was the partisan, rather than the critically-thinking intellectual or engineering economic planner, that played key role there.

The three key traditions of the Communist thought developed in the 20th century were considering the revolution of disputed hegemony, economic build-up, and liberatory war. Each of them had a certain impact upon the development of the colonial (and post-colonial) agenda. However, originally it was the third tradition that was dealing specifically with the problems of socialist revolution in a colony. This allows to specify the scope of the present article: it deals with the intellectual impact of the third tradition, a certain part of the larger Communist (Leninist) body of thought which, in its own turn, was a part of the global Marxist thought. The theories of the Third International were incorporated into the body of anti-colonial liberatory thought already in the 1920s when the attention of the *Comintern* was attracted to Asia and, particularly, to China. The development of this tradition was driven forward by the experience of the actual military (rather than political) struggle in the colonies, inevitably merging the concepts of liberatory revolution and liberatory war. Thus, the

issue of colonial revolution—that is, the revolution in an undeveloped country under the military influence of capitalist powers, which is capable of overcoming not merely its own backwardness but also the military superiority of the metropoly—emerged as a problem of liberatory warfare. At that time, the key questions were formulated: first, how could the revolution in a colony succeed both socially (since there is no proletariat) and militarily (since capitalism is powerful)? Second, how could a newly emerged state be independent and avoid succumbing to the economic power of imperialists and, so to say, deal with what Michael Hardt and Antonio Negri called "the poisoned gift of national liberation"?

The body of theoretical works, political proclamations and methodological approaches developed within the *Comintern* during the Interbellum was enormous, and this is even more true in relation to anti-colonial and New Communism writings of the middle of the 20th century. It is beyond the scope of the present article to cover it all. I would concentrate on three figures of greatest prominence: I start with Georgy Safarov, a prominent but almost forgotten figure in the Bolshevik Party of the 1920s who in 1921–1931 elaborated perhaps the most interesting theory of colonial revolution. Then I will discuss the political concepts of protracted war developed by Mao Zedong. The final part of the article deals with Frantz Fanon and his theory of revolution in Africa. Why these figures? Many Soviet theorists tried to find in the *Comintern's* resolutions some ideas about the colonial revolution, but Safarov was the first Soviet author who took the colonial theory seriously, as well as the most original thinker among Soviet intellectuals who discussed the subject; it was Safarov who provided the detailed argumentation in support of Lenin's insights about the national-colonial question. In the 1930s, the *Comintern,* following Moscow's political aspirations, oriented itself towards Europe rather than Asia and Africa; and the whole colonial agenda receded into the background. Still, the colonial agenda was elaborated by the Chinese Communists; this subsequent development of the *Comintern's* ideas regarding the revolution in a colony is researched through the intellectual heritage of Mao Zedong. After the Second World War, a full-scale anti-colonial movement emerged, supported both by the USSR and the revolutionary China. This period provides plenty of figures to choose from. Robert Young once stressed that theoretical and political identification of post-colonial theory "goes back to the works of Frantz Fanon and Che Guevara" (Young, 2003, p. 7). Unfortunately, Fanon's relations with the preceding *Comintern* and anti-colonial tradition is often overlooked; for instance, in the recent and otherwise illuminating book on Fanon's thought, *Frantz Fanon, Postcolonialism and the Ethics of Difference* by Azzedine Haddour, the *Comintern* legacy or at least Lenin's ideas are not mentioned as if there was no decades of anti-colonial thought and action in the period of the 1920s–1950s based upon the *Comintern* resolutions and subsequent experience of liberatory wars; instead, Fanon is directly compared with the "Marxist orthodoxy" (Haddour, 2019, pp. 160–161; Salem, 2018, p. 429). The present article aims, above all, at filling this gap. Thus, the three selected figures shed light on the changes which the concept of colonial revolution endured at different times and in different places. We should, however, keep in mind the general problem—the trajectory of the concept's travel from the Communist to post-colonial

paradigm of thinking or, in other words, how the concept that originally developed within the third tradition of Communist thought became associated with the first, Gramscian tradition.

Of course, there were certain mutual influences between these thinkers: they all were borrowing from the intellectual legacy of Lenin and the *Comintern*, in which Safarov himself played an important role and which influenced both Mao and Fanon. However, this article is aimed not at uncovering "intellectual genealogy" (Safarov's influence on Mao, Safarov and Mao on Fanon, etc.), but rather at investigating the similarities and differences in the deployment of concepts, originally elaborated in the period of the First World War, Russian Revolution of 1917 and the foundation of the *Comintern* in 1919. Such deployment occurred in different locations and under different circumstances: that is, Safarov's experience of supporting indigenous peoples in their struggle against Russian colonists in Central Asia amidst the Civil War; Mao's action in North-western China as an actual military leader fighting Japanese invasion; and Fanon's experience in Algeria as a leading theorist of the liberatory war against France. No doubt, Safarov's situation was peculiar, since in Central Asia there was in fact a revolution "from above" rather than a liberatory war; yet in a broader sense, all these cases could be seen as revolutions in colonies, which were theorized with the help of conceptual tools derived from the resolutions of the 2nd Congress of the *Comintern.*

Thus, the article aims to demonstrate how the very idea of revolution in a colony was developed in several important contexts, traveled through several locations, eventually becoming a foundation for the theory of liberatory war and the basis for the counter-hegemonic project of post-colonial theory. In addition, the article aims at considering the problem of relations between post-colonial theory and the Communist concept of colonial revolution. Therefore, the article makes a special emphasis on Fanon's *Wretched of the Earth* (1961/1963) in order to show how the development of the problems of colonial revolution, which mainly took place within the third tradition of the Communist thought, was combined with the innovative psychoanalytical approach, thus putting the intellectual tools of the first (Gramscian) tradition centre stage in the post-colonial agenda.

Safarov's Plebeian Revolution

Georgy Safarov, a prominent Bolshevik since 1908 and an affiliate of Vladimir Lenin and Grigory Zinoviev, held important political positions in Central Asia in 1919–1921 during the years of political and military struggle in the region—he was a member of several governing bodies whose task was to put Central Asia under the Bolsheviks' control. In 1921, he summarized his practical experience on the theoretical level by publishing a paper entitled *Kolonial'naia revoliutsiia (Opyt Turkestana)* [Colonial Revolution (Experience of Turkestan)]. The following year, he published a book under the same title where he expanded his vision of the subject. Safarov's work was successful, and he tried to solidify his reputation as an expert in colonial and national matters. In 1923, he published *Natsionalnyi vopros i proletariat* [National Question and Proletariat]. In the subsequent years Safarov was somewhat distracted by his participation in the

struggle for power within the Bolshevik party: in 1923–1924 as a staunch supporter of Grigory Zinoviev, he was among the leading Bolshevik theorists attacking Leo Trotsky. When in 1925 Zinoviev became a target for the attacks from Joseph Stalin and Nikolay Bukharin, Safarov again was at the forefront of the conflict. He played an important role as a member of the so-called "united opposition", when Zinoviev, Trotsky and their supporters joined forces. After the defeat of the "united opposition", he was arrested and exiled to Achinsk, but in 1928 he returned to Moscow and was permitted to work in the *Comintern*. In 1930, Safarov published his paper *Problema natsii i antiimperialisticheskie revolutsii* [Problem of Nation and the Anti-Imperialist Revolutions]; just as ten years before, the paper was soon followed by a larger volume expanding the key points, entitled *Problemy natsionalno-kolonialnoi revolutsii* [Problems of National-Colonial Revolution]. In 1934, after the murder of Sergey Kirov, Safarov was arrested again and was imprisoned—thus effectively putting an end to his career of a political theorist—until his execution in 1942.

What new ideas did Safarov bring to the general understanding of colonial revolution elaborated at the 2nd Congress of the *Comintern*? He remained fiercely loyal to Kautsky's economic approach to understanding the nation and relied on Kautsky's theory for describing the present-day Western nation-states as outcome of the political and economic ascent of the bourgeoisie. In the course of the bourgeoisie's rise, it consolidated the emerging common market by means of cultural and political control, and, in doing so, disposed of the political domination of feudal elites. However, globalization undermines the basis of nation-states effectively dissolving them within the larger trans-national economic complexes; the contradiction between the global economy and the political superstructures of the nation-states leads to permanent waves of military conflicts among the leading capitalist powers (here Safarov follows the analytical works of Lenin and Bukharin on imperialism). The bourgeoisie's fight for national independency against the feudal empires used to be progressive, as it was paving the way for new capitalist formation, but nowadays nationalism turns out to be reactionary for reasons explained above. Sooner or later, economic progress will destroy national borders, replace national languages with the sole "language of international trade", and bring about an "American mill of nations" on a global scale. Such transition is possible only after the global socialist revolution. These arguments are fully in line with the classical Kautskian vision of the national question.

However, speaking of colonial issues, Safarov takes on a different direction. He argued that colonial rule of capitalist powers over the backward feudal countries did not undermine the basis of feudalism in colonies, but rather *strengthened* it. Contrary to what the European Socialist Democracy believed colonialism did not have any developmental mission in the colonies. Safarov even wrote about the "blockage of economic development of colonies by imperialism" (Safarov, 1930, p. 77). Although this was, again, a commonplace of Leninist thought, Safarov masterfully expanded this point by dwelling on his own revolutionary experience in Central Asia: as he observed, in the colonies, even the social groups exploited by the metropolitan country became privileged oppressors. To be an industrial worker was a *privilege* in Central Asia. Thus, colonial Central Asia was suffering from three main types of exploitation:

the native feudal elites, the foreign (namely, Russian) capital, and the Russian settlers who literally seized the land and water from the natives.

While at home the bourgeoisie had dismissed feudalism and established formal equality of citizens before the law, in the colonies the situation was absolutely different. Colonial rule is based almost solely upon the brutal force—the overwhelming technical-military strength of the imperialists. Here "national inequality is simultaneously an estate, political inequality: for one, being a member of the ruling nation, has specific rights and privileges, while the others are stripped of a part of their rights or of any rights—like serfs lacking any rights under the feudal regime" (Safarov, 1931, p. 16; my translation from Russian—K. B.). For Safarov, the settlers and colonizers cannot be the backbone of revolution in a colony, even though they represent more progressive economic orders than the natives, many of whom are still nomadic. The conclusion is clear: the colonial revolution could only be exercised by the natives, who must both eradicate their own comprador and semi-feudal elite and drive the settlers and colonizers off the land.

But if there is no native working class, then what social force is capable of being revolutionary within the Marxist theory of proletarian revolution? Safarov was searching for an answer by reiterating the idea of "plebeian elements" referring both to Lenin and to Engels and striving to develop a more systematic theoretical approach. Safarov laid a special emphasis on this analogy—the imperialists are "attaching" the enslaved colonies to the production of raw materials just as feudal landlords were "attaching" serfs to the land (see: Safarov, 1931, p. 104), and putting them into ghettoes. In other words, capitalism, while entering the global market, "retreats to the position of feudalism" (Safarov, 1931, p. 93; my translation from Russian—K. B). This characteristic was apparently pejorative: the feudal system reproduced by imperialism on a global scale has nothing to do with the progress and must be demolished recklessly. The bourgeois revolution will not redeem the backward areas of the world, and the creation of "ordinary" nation-states with their respective capitalism is impossible for colonies: "What if complete hopelessness of the situation, tenfold the strength of the workers and peasants, opened us a possibility of a different transition to creation of the new prerequisites of civilization in regard to other European states?" (Safarov, 1930, p. 79; my translation from Russian—K. B.).

Thus, the revolutionary thrust of the exploited native plebeians is the only solution, for "political superstructure and culture are forming in the process of storm and onslaught of the masses not in a strict compliance with the turtle pace of economic development" (Safarov, 1930, p. 78; my translation from Russian—K. B.). Safarov sums up:

> Anti-imperialist struggle gives birth to a long chain of social changes, political and cultural revolutions, which form the existence of backward peoples. Across all the historical leaps and "breaks of gradualness", the clash between the "Lutheran-knightish" and "plebeian-Muntzerian" tendencies runs like a red thread. All these preliminary stages of revolutionary development are turning out to be in the final historical account the forms of their convergence with both

> the global socialist revolution and its most important pillar—the first socialist Soviet Union. (Safarov, 1930, p. 95; my translation from Russian—K. B.)

In other words, colonial revolutions, destructive and purging as they are, will open the way for the colonial nations to integrate directly into the Soviet system in their own distinctive manner. Of course, Safarov did not openly advocate the peasant war; rather, he emphasized the role of the rising proletariat of colonies. However, his favorite analogy, which presented colonies as collective serfs, his frequent references to the "plebeian-Muntzerian" movement (traceable, again, to Engels's writings on the Peasant War in Germany), and his calls for an immediate revolutionary thrust in the colonies were indicators of his sympathy towards the idea of a peasant uprising.

The very term *plebeian* was borrowed by Safarov from the works of Karl Marx and Friedrich Engels. Obviously, Marx referred to *plebs* in a rather ambiguous way (Bourdin, 2013). In his recent work, Martin Breaugh outlines the European tradition of plebeian politics (strangely enough, Breaugh excludes Marx from the line of plebeian thinkers, while simultaneously including Giambattista Vico and Montesquieu, and he barely mentions Lenin or Mao at all, let alone Safarov): "It arises when people excluded from the *res publica* transform themselves into political subjects able to act in concert […] The plebeian experience thus confirms the existence of communalist and agoraphile political traditions throughout Western political history" (Breaugh, 2007/2013, p. 241). Santiago Castro-Gomez adds that during his early years Marx was moving away from an abstract, Hegelian republicanism towards exactly this kind of plebeian republicanism (Castro-Gomez, 2018, p. 25). The very manner of describing social structures by means of Roman historical analogies is in use even today (Ferguson, 2019, p. 15). In turn, Engels frequently spoke about "plebeian and proletarian ascetism" of Thomas Muntzer's followers in *The Peasant War in Germany*:

> The plebeian opposition consisted of ruined burghers and the mass of townsmen without civic rights—journeymen, day labourers, and the numerous precursors of the lumpenproletariat, who existed even in the lowest stages of urban development. The lumpenproletariat is, generally speaking, a phenomenon that occurs in a more or less developed form in all the so far known phases of society. (Marx & Engels, 1978, p. 407)

Engels's treatise played a pivotal role in making the concept of "plebeian elements" important for the Marxist tradition, especially when one talked about the revolutions of the 17th–18th centuries, the period when the working class was absent from the historical scene. The mentions of "plebeian elements" or even "plebeian parties" entangled with the numerous references to the history of the French revolution are abundant in the works of Bolshevik political leaders including Lenin and Trotsky. Of course, this concept remained problematic as it was not clearly distinguished from the concept of "petty bourgeoisie". One of Soviet social historians from the 1930s, Nikolay Lukin, explained the exact composition of these plebeian elements: the

waged workers (including seasonal workers), handicraftsmen, street traders and the lumpen-proletariat, that is, "porters, organ-grinders, jugglers, dog-shearers, beggars, etc." (Lukin, 1934, p. 113; my translation from Russian—K. B).

After achieving independence in the "plebeian-Muntzerian" way, how could former colonies evade being dependent upon Western capitalism in economic terms and secure themselves against what Trotsky later called the "intervention of cheap goods"? (Trotsky, 1936/1937, p. 17) Safarov responds by referring to Marxist classics: the proletariat will help its peasant brothers and sisters in creating a new, socialist economy. Surely, such help could be provided by the victorious European or American proletariat, but Safarov does not discuss such possibility; after all, that point would mean that the colonial revolution depends upon the European revolution, and that, without the European working class, any revolutionary thrust in the colonies would be futile. Thus, Safarov envisioned that the Soviet Union would assist the newly emerging peasant revolutionary countries, just as Soviet Russia assisted the native peoples of Central Asia, in the collectivization of the country and industrialization of the cities. Thus, Bolshevik experience of managing a socialist revolution and the subsequent socialist build-up in a colony became for Safarov a pattern for all colonial countries struggling for liberation. In a peculiar way, he brought together the sympathy towards the uncompromising struggle for liberation in colonies and the sheer admiration for the USSR's growing industrial strength. The rhetoric of violent liberation was intertwined with the vision of industrial power. As Modest Kolerov has recently noticed, "awareness of the technological and social backwardness of the USSR gave a touch of national liberation to the pathos of the Bolsheviks" (Kolerov, 2017, p. 129; my translation from Russian—K. B.).

It was Safarov who put together a set of rather unsystematic *Bolshevik/Comintern* ideas on colonial revolution to develop a theory of anti-colonial peasant war (though it was never presented as a single theoretical construction, partly due to Safarov's passionate style of arguing). While the very concept of peasant uprising as a way to revolution in a colony was widespread among the *Bolshevik* theorists, Safarov diligently devised a suitable analogy presenting the whole revolutionary struggle in colonies as a "plebeian-Muntzerian" uprising thought in terms of a peasant war against the feudal regime. Safarov drew a totally different conclusion from the one made by Manabendra Roy, who insisted that the Indian revolution was possible only due to the fact that capitalism presumably had done much to develop India's industry, or the ideas expressed by Karl Radek in regard to China. He also was the first Communist thinker to postulate the grave differences between the colonizers and colonized; the former, even being exploited workers, had a privileged status in a colony.

Another important aspect of Safarov's vision of the national-colonial revolutions was his position of an external observer. Being in the middle of the revolutionary events of Central Asia, he nevertheless remained an emissary from Moscow, and, deliberating on the Chinese and Indian revolutionary movement, he was still pursuing the Soviet political line, that is, any revolutionary movement in the world was seen as inferior in comparison with the safety of the Soviet state. From this perspective, the permanent and fierce fight in the colonies could also be seen as

a tool of providing protection for the USSR on the grounds that the imperialists being busy in colonies would not dare to attack the Soviet Union. However, in the mid-1930s the whole colonial agenda faded into the background in Soviet Marxism and in the *Comintern*: The Chinese Revolution was in the stalemate, and the war in Europe was approaching, so for the Red Moscow the very colonial powers started to be seen as desirable potential allies against the aggressive Fascist bloc. In turn, it led to the disappointment in the *Comintern*'s liberatory rhetoric, for most of the colonial world was under the domination of those very "peaceful democracies" whom the Red Moscow tried to approach as allies.

Mao's Protracted War

While Moscow started to pay less attention to the colonies, the struggle in colonies was going on, with China as the largest battlefield. The country nominally united by Kuomintang was still suffering from the civil war as neither the military leaders nor the Communist party submitted to Chiang Kai-shek's rule. Soon, internal tensions attracted hostile attention from abroad. Since 1931, Japan started to invade China, and in 1937 the war was declared openly. The Communist forces led by Mao Zedong, who at the time strengthened his position as the leader of the Communist Party of China, retreated to the Western regions of China in 1935. From the city of Yanan, Mao ruled the whole Shaan–Gan–Ning border region (since 1936 Communists and Kuomintang became allies against the Japanese). The period of isolation in Yanan is considered to be as the most productive in Mao's political career. Here, he developed his famous theory of protracted war, a great revive of the peasant war or, as Carl Schmitt called it, the *Theory of the Partisan* (Schmitt, 1962/2007). In 1938, a series of lectures of Mao Zedong were published under the title *On Protracted War*.

Mao was familiar with the statements of the *Comintern* on colonial revolution and warfare, as well as with the overall Leninist approach to the problem of just and unjust wars. Mao's ideas became an important step in the development of anti-colonial thought under the Leninist (or the *Comintern*) aegis, especially given the fact that by the end of the 1930s, the Moscow theorists were much less interested in the anti-colonial struggle than ten years before. Unlike Safarov, Mao was not interested at all in the problem of the indigenous-settler relationships (most probably since China was not colonized by settlers either from the West or from Japan), and he did not use the very term "colonial" (let alone "national-colonial") revolution. But even if Mao did not use this word, he surely elaborated the concept, producing a comprehensive analysis of colonial revolution interpreted as a liberatory war and reflecting the Chinese Communists' unique experience of protracted partisan war against the Kuomintang and Japanese invaders. Mao's elaboration contributed greatly to the formation of a new understanding of colonial revolution (already outlined in Safarov's works) as a liberatory anti-colonial war. Of course, since 1927, the primary enemy of the Communists in China was Kuomintang, but soon that political enemy was re-imagined as an agent of imperialists. As Mao postulated already in his *Why is it the Red Political Power Can Exist in China* (1928),

> regime of the new warlords of the Kuomintang remains a regime of the comprador class in the cities and the landlord class in the countryside; it is a regime which has capitulated to imperialism in its foreign relations and which at home has replaced the old warlords with new ones, subjecting the working class and the peasantry to an even more ruthless economic exploitation and political oppression. (Mao, 1965a, p. 63)

In *Problems of Strategy in China's Revolutionary War* (1936), he theorized over the laws of the revolutionary war, which could be either a "class war" or "national war", in the specific conditions of "semi-colonial China" (Mao, 1965a, pp. 179–181). In *Bankruptcy of the Idealist Concept of History* (1949), Mao provided a concluding description of China's revolution as a liberatory war against the "imperialists" and their "running dogs":

> In its first battle, this scientific and revolutionary new culture acquired by the Chinese people defeated the Northern warlords, the running dogs of imperialism; in the second, it defeated the attempts by another running dog of imperialism, Chiang Kai-shek, to intercept the Chinese Red Army during its 25,000-*li* Long March; in the third, it defeated Japanese imperialism and its running dog, Wang Ching-wei, and in the fourth, it finally put an end to the domination of China by the United States and all other imperialist powers as well as to the rule of their running dogs, Chiang Kai-shek and all the other reactionaries. (Mao, 1961, pp. 456–457)

The fact that certain "running dogs" were at times seen as allies (as was the Kuomintang during the struggle against the Japanese invasion) did not affect the key ideas of Mao's military-revolutionary strategy.

Indeed, in his works of the late 1930s, Mao examined the possibility of success in a colonial liberatory war. He followed (perhaps unintentionally) Safarov in saying that imperialism rules colonies by sheer force; therefore, colonial countries cannot just develop their respective economies under the colonial yoke to a degree when they will become powerful enough to compete with the imperialists. The Marxist understanding of power prevented them from considering that the spirit or enthusiasm of uprising to would outweigh the imperialists' war machines with their technological sophistication. Mao's answer was that, even though Japan was stronger in purely military terms, China was much larger and more capable to wage a war of attrition; that is why the liberation war was a "protracted war". The key issue was to mobilize the mass of peasantry:

> Besides employing trained armies to carry on mobile warfare, we must organize great numbers of guerrilla units among the peasants […] The Chinese peasants have very great latent power; properly organized and directed, they can keep the Japanese army busy twenty-four hours a day and worry it to death. It must be remembered that the war will be fought in China, that is to say, the Japanese army will be entirely surrounded by the hostile Chinese people. (Mao, 1967, p. 10)

When the peasant mass entered the battlefield, the preponderance of China in terms of military force would be ensured.

However, Mao was aware that there were lots of examples when smaller countries conquered larger ones—like in the case of Britain against India, or Italy against Ethiopia. Mao made great efforts to explain how China could avoid the same fate as Ethiopia or India. When Italy attacked, Ethiopia proved unable to defend itself, while the expectations of the imperialists' collective attempt to prevent Italy from devouring it also failed. According to Mao, the situation in China was different, for it was much more developed economically and socially than India during the British conquest or Ethiopia during the Italian invasion. In addition, British imperialism was dynamic and rising, while Japanese imperialism was declining and decaying. Japan was internally weak, Mao insisted, and the revolution in Japan was an important factor for planning and waging the war of liberation. In speaking so, he echoed the classical approaches of the Leninist theory of war. In addition, the international situation by the end of the 1930s had changed totally:

> The popular movements in the world today are developing on a scale and with a depth that are unprecedented. The existence of the Soviet Union is a particularly vital factor in present-day international politics, and the Soviet Union will certainly support China with the greatest enthusiasm; there was nothing like this twenty years ago. All these factors have created and are creating important conditions indispensable to China's final victory. (Mao, 1967, p. 20)

Thus, the three main factors made Chinese victory inevitable: the strategic advantage in resources (or, simply, China was bigger); the internal weakness of Japanese capitalism; and the international situation—both the existence of the Soviet Union and the possibility of anti-Japanese coalition. Among these three factors, the mobilization and unity of China's forces was the most important one; the two others (the revolution in Japan and international coalition against Japan) could reduce the time and costs required for the final victory (see: Mao, 1967, p. 107). Importantly, Mao often stressed that the war against Japan would be long and disastrous: even though the final victory would inevitably be achieved, no one could expect a fast and easy victory. The process of the war of liberation here was—just as in Safarov's works—constitutive.

However, in the way he envisioned the events to follow after the defeat of the imperialists, Mao differed from Safarov. By the end of the 1930s, Mao embraced the concept of *new democracy*. He referred neither to Lenin or Stalin, nor to the *Comintern*'s directives and resolutions (see: Smirnov, 2012, p. 383). However, the intellectual roots of this concept are quite clear. In 1928, striving to support the integration of the Communist party of China and Kuomintang, the *Comintern* proposed the slogan of "people's democratic dictatorship". It was heavily criticized by the leftist opposition within the *Bolshevik* Party, including Safarov. However, the terms of "democratic dictatorship" and "Sovietization" were rather vague. N*ew*

democracy ought both to unite different social groups (that was what the *Comintern* pursued under the banners of "popular fronts") and to facilitate the accelerated development of capitalism in China. The latter resembled the older *Comintern* politics towards Chinese revolution in 1927, when Moscow leaders insisted on integrating communists into the Kuomintang structure, but at that time with the Communist party at the helm, which was seen as the only way out of backwardness and poverty. Unlike Safarov's ideas of the national-colonial revolution driving subjugated nations directly to socialism and skipping the phase of the bourgeois republic with the support from the already existing "workers' state", Mao's *new democracy* meant to serve as a specific bourgeois phase of development under control of the Communist political force. Apparently, the leaders of the Chinese communists didn't believe in any substantial assistance from the Soviet state; so, Mao prepared not for the skipping of the capitalist phase in Chinese history, but for a long period of co-existence and cooperation with their political opponents as well as with the Western powers.

Thus, Maoist thought of the 1930s–1940s creatively combined two concepts: the idea of "democratic dictatorship", which was already permanently present in the *Comintern's* political assessments since the late 1920s; and the idea of peasant war, which coincided with what Safarov wrote about the "plebeian" movement. These key ideas were now reiterated in the light of Mao's own experience of a long peasant war, semi-partisan fighting, and prolonged isolation in Yanan, giving birth to the specific concept of peasant war: "The Communists' arrangements for the peasants, and their provisions to the uprooted rural people serving the 8th Route Army, permitted them to inspire the peasants to see the war as a quest to restore the values of family and village life and to support the great leap from local, self-defensive insurgency to national revolutionary war" (Thaxton, 2017, p. 55). Most probably, these political concepts also emerged from the influence of earlier Sun Yat-Sen's thought on democracy (Bedeski, 1977, pp. 340–341). This was a distinctly—yet recognizably Marxist and, more strictly, Communist—Maoist concept of colonial revolution and liberatory war.

Even as the People's Republic of China was affected heavily by the Soviet experience since the late 1940s, Mao was permanently aware of the undesirable effects of direct intellectual exports from Moscow. Historically, it turned out that a decisive role was played by the international factor rather than by China's own mobilization of resources, as the Japanese Empire was destroyed by the international coalition, though the Japanese army was unable to conquer China by force, just as Mao predicted. But events went a different way:

> In developing the strategy of the new democratic revolution, Mao Zedong expected the support from the USA to rebuild the economy of the new democratic state after the war. Instead of lending such support, the USA openly intervened into the Chinese civil war on the side of the Kuomintang, providing ostensible military and financial help to Chiang Kai-shek. Thus, real support to Mao Zedong was provided by the Soviet Union, which assisted in creating a military-revolutionary base in Manchuria. (Smirnov, 2009, p. 27; my translation from Russian—K. B.)

The resulting changes in political attitudes strongly resembled the ideas which Safarov put forward in his *Problems of National-Colonial Revolution*: The Soviet Union started to provide massive assistance to drive the Chinese economy forward[1]. For example, the concept of peasant war proved incompatible with the radical land politics of *dekulakization*, which some of the Stalinist factions of the Chinese Party were trying to pursue (Womack, 1982, pp. 135–137). In the 1945 speech entitled *On Coalition Government,* Mao proclaimed:

> Some people fail to understand why, so far from fearing capitalism, Communists should advocate its development in certain given conditions. Our answer is simple. The substitution of a certain degree of capitalist development for the oppression of foreign imperialism and domestic feudalism is not only an advance but an unavoidable process. It benefits the proletariat as well as the bourgeoisie, and the former perhaps more. It is not domestic capitalism but foreign imperialism and domestic feudalism which are superfluous in China today; indeed, we have too little of capitalism. (Mao, 1965b, p. 283)

Thus, "new democracy" was rather meant to facilitate the capitalist development under the watch of the Communist party. Surely, Mao distrusted the bourgeoisie, that is why political control had to remain in the hands of the Communist party. Mao retained his concept of "new democracy", albeit in a slightly different form. He emphasized in his 1949 work, *On the People's Democratic Dictatorship*: "Who are the people? At the present stage in China, they are the working class, the peasantry, the urban petty bourgeoisie and the national bourgeoisie. These classes, led by the working class and the Communist Party, unite to form their own state and elect their own government" (Mao, 1961, pp. 417–418)[2]. Despite the fact that certain party members thought "new democracy" to be a transitory period for a couple of decades, its conceptual apparatus still serves as a symbol of social consolidation and concord in present-day China (see: Rudolph, 2021, p. 299).

The idea of protracted peasant war, which had liberating, emancipatory and democratic effects by itself, was a step in the same direction as Safarov's plebeian uprising. While the final purpose, besides the national independence, was certainly economic and cultural development, the economic build-up itself was not considered to be a liberatory process; it was understood rather as a firmly controlled capitalist

[1] In the 1930s, the Soviet Union depended on the West for technological assistance, relying upon foreign cadres, technologies and equipment. During the First Five-Year Plan of China, the scale of the task was comparable, yet now all the foreign support came from the USSR, which alone played the same role as the United States and Germany together played for Soviet industrialization in the 1930s. 156 industrial objects were reconstructed or built from scratch with the Soviet assistance (see: Hanbing, 2010, p. 157). But while the industrial build-up was underway, the collectivization of the land was halted.

[2] Mao classified all political regimes in the world as different kinds of dictatorship: that is, the republics under the bourgeois dictatorship, republics under the dictatorship of the proletariat, and republics under the "joint dictatorship of several revolutionary classes". Again, he closely followed the Leninist patterns in considering any republic as a dictatorship, but added to that his own specific treatment of the concept of the dictatorship of several revolutionary classes, a transitional political regime, which by the end of the 1920s was promulgated in the *Comintern* by Joseph Stalin and Nikolay Bukharin.

growth under the aegis of the triumphant Communist party—a vision rather similar to Lenin's new economic policy, though in the presence of the Soviet neighbor it was reshaped heavily. Indeed, Stalin himself considered the Chinese position as a sort of an imitation of Soviet Russia's new economic policy, and so did the number of influential Chinese party officials; those who insisted on forced emulation of the Soviet model were criticized harshly. National independence achieved by means of war rather than economic victory over backwardness was the key idea in Maoism at that time. Those ideas brought the Maoist concept of protracted war close to what Safarov envisioned, but there were two conceptual lines that differed in relation to the national bourgeoisie: while Safarov believed that the colonial bourgeoisie was feudalized and had to be swept aside, Mao—while using the very term "feudalism" in the same pejorative way as Safarov did—drew the line between the "good" and "bad" bourgeoisie, allowing for a sort of social consolidation to support independency. Of course, these distinctions remained part of the tradition stemming from the resolutions of the 2nd Congress of the *Comintern.* Despite the differences, both approaches welcomed a broad social movement involving the peasantry and petty bourgeoise, both were demonstratively hostile towards "feudalism", and both insisted upon the possibility of winning the liberatory war against the imperialists and staging a revolution even in the absence of the revolution in the West.

Fanon's Counter-Hegemony

The intellectual and political context in which Franz Fanon's writings appeared was quite different, but it bore certain similarities with the experience of Safarov in Central Asia and Mao Zedong in Yanan. Fanon's political thought emerged in the context of the Algerian War, which, in its turn, was part of the broader frame of Africa's liberation from colonial dependency. Fanon most probably was familiar with the resolution of the first four Congresses of the Communist International (Hudis, 2015, p. 79).

In his arguably most influential work, *The Wretched of the Earth*, Fanon described the process of colonization as brutal subjugation by sheer violence, pointing out that the settlers' presence in colonies "was carried on by dint of a great array of bayonets and cannons" (Fanon, 1961/1963, p. 36). The conquest is inevitably followed by the psychological trauma, as the new masters turn the colony into a space of delusion. The subjugation strips the colonial peoples of their history: in colonies the settlers made history, and while they drove the social progress, they faced the "torpid creatures, wasted by fevers, obsessed by ancestral customs, form an almost inorganic background for the innovating dynamism of colonial mercantilism" (Fanon, 1964/1967, p. 51). For Fanon, "the colonial world is a world cut in two" (Fanon, 1964/1967, p. 38), and to revolt is to discover the grim truth behind the web of words so carefully woven by the imperialists:

> After centuries of unreality, after having wallowed in the most outlandish phantoms, at long last the native, gun in hand, stands face to face with the only forces which contend for his life—the forces of colonialism. And the youth of

> a colonized country, growing up in an atmosphere of shot and fire, may well make a mock of, and does not hesitate to pour scorn upon the zombies of his ancestors, the horses with two heads, the dead who rise again, and the djinns who rush into your body while you yawn. The native discovers reality and transforms it into the pattern of his customs, into the practice of violence and into his plan for freedom […] What they demand is not the settler's position of status, but the settler's place. The immense majority of natives want the settler's farm. For them, there is no question of entering into competition with the settler. They want to take his place (Fanon, 1964/1967, p. 58)[3].

This famous justification of violence is quite similar to the formulas of the *Comintern* thinkers and, in particular, to Safarov's vision of imperialism as a global reactionary force, which subjugates and governs colonies without any popular support, relying solely on its terrifying military strength, on dreadnoughts and airplanes. Inevitably, the colonial population, for whom this brutal conquest was aggravated by the psychological trauma, might only rely on violence, according to Fanon's premises.

As Fanon recognized the violent liberatory war against colonialism as the only solution for colonies, he faced the same question as Safarov and Mao: how could a colony be victorious against such monstrous war machine? Many authors considered the spirit of liberation and enthusiasm to be sufficient for a victory. For instance, Kwame Nkrumah in his *Handbook of Revolutionary Warfare* (1969), comparing the overall strength of the imperialists with that of the Independent States of Africa, was optimistic: "We possess the vital ingredient necessary to win—the full and enthusiastic support of the broad masses of the African people who are determined once and for all to end all forms of foreign exploitation […] Against such overwhelming strength organized on a Pan-African basis, no amount of enemy forces can hope to succeed" (Nkrumah, 1969, p. 23). But Fanon, whose connections to Marxism made him sensitive to the realistic arithmetic of power, provided much more elaborated argumentation.

First, there are powerful rivals of the imperialists representing the socialist bloc, whose industrial and military strength somewhat undermines Western military superiority. Sebastian Kaempf stresses the Manichean aspects of Fanon's approach to colonialism presumably borrowed from the writings of Jean-Paul Sartre: "It was along the lines of Sartre that Fanon came to see a world made up of binaries as well as dialectics, and divided into two compartmental zones: the zone of the coloniser

[3] This apology of violence typically attracts students of Fanon's political philosophy; there was a debate on whether Fanon unconvincingly supports violence or not. Sebastian Kaempf summarizes Fanon's views of violence as following: "Precisely because colonialism represented a systematic and deliberate form of exploitation and dehumanization, it could only be overcome by force" (Kaempf, 2009, p. 140). There is a debate on whether Fanon was unconvincingly supporting the extreme violence of not, and some authors argued that "he was not, as is customarily thought, an advocate of the indiscriminate use of violence" (Jinadu, 1973, p. 256). L. Adele Jinadu, for instance, is trying to find an inconsistency in Fanon's analysis: "What Fanon probably overlooks, in effect, is the important fact that social injustice is not a defining characteristic of colonial rule. There is no logical contradiction in the notion of an 'enlightened' or 'benevolent colonialism. Thus, Marx could, with respect to British rule in India, talk of the 'unconscious' benefits of colonial rule" (Jinadu, 1973, p. 261). Unfortunately, Jinadu totally overlooks the whole tradition of Leninist and Maoist thought which develops Marxist theory in an opposite way, and which definitely influenced Fanon's own writings.

or settler and the zone of the colonised or native" (Kaempf, 2009, p. 140). In fact, Fanon analyzes the anti-colonial struggle in the context of confrontation between the capitalist and socialist blocs, which both stimulates violence and creates possibilities for liberation, since "all the jacqueries and desperate deeds, all those bands armed with cutlasses or axes find their nationality in the implacable struggle which opposes socialism and capitalism" (Fanon, 1961/1963, p. 78). The military and diplomatic confrontation of the two blocs was seen by Fanon as an important factor in the liberatory fight of colonies:

> When Mr. Khrushchev brandishes his shoe at the United Nations, or thumps the table with it, there's not a single ex-native, nor any representative of an underdeveloped country, who laughs. For what Mr. Khrushchev shows the colonized countries which are looking on is that he, the *moujik*, who moreover is the possessor of space rockets, treats these miserable capitalists in the way that they deserve". (Fanon, 1961/1963, p. 78)

Second, within the very colonialist camp there are forces which cannot support older, militaristic ways of control, preferring milder methods of ensuring their hegemony over former colonies. Fanon's vision of victory in a colonial revolt was different from what Mao postulated. While Mao expected three factors to play—that is, China's impressive domestic resources, Japan's internal weakness, and the changing international situation—Fanon believed that the victory was possible due to internal changes within the very structure of imperialism. Though it conquered the colonies with a "great array of bayonets", it cannot rely upon sheer strength anymore. Surely, the confrontation of capitalism and communism creates new possibilities for colonial liberation, but the key factor is the change within the capitalist order itself. Fanon even draws a historical parallel: once German Nazism turned Europe into a "veritable colony", and now Germany has to pay reparations. However, such payments did not prevent Germany from re-integrating into the European economic system; the West was in need of economically healthy and strong Germany. The same will happen to the Third World:

> The colonies have become a market. The colonial population is a customer who is ready to buy goods; consequently, if the garrison has to be perpetually reinforced, if buying and selling slackens off, that is to say if manufactured and finished goods can no longer be exported, there is clear proof that the solution of military force must be set aside. A blind domination founded on slavery is not economically speaking worthwhile for the bourgeoisie of the mother country. The monopolistic group within this bourgeoisie does not support a government whose policy is solely that of the sword. What the factory owners and finance magnates of the mother country expect from their government is not that it should decimate the colonial peoples, but that it should safeguard with the help of economic conventions their own "legitimate interests". Thus, there exists a sort of detached complicity between capitalism and the violent forces which blaze up in colonial territory. (Fanon, 1961/1963, p. 65).

From here, a new strategy of imperialism emerges, replacing bayonets with compromises: "Their purpose is to capture the vanguard, to turn the movement of liberation toward the right, and to disarm the people: quick, quick, let's decolonize. Decolonize the Congo before it turns into another Algeria" (Fanon, 1961/1963, p. 70).

The thrust was based upon the marginal social groups. As Clyde Barrow emphasizes, "Fanon was the first political theorist influenced by Marx to seriously revisit the problem of the lumpenproletariat after the Russian and Chinese revolutions" (Barrow, 2020, p. 87). The weak, greedy and corrupted bourgeois elite, which emerged within the system of colonial rule, will be unable to establish strong and healthy national states (Eyo & Essien, 2017, p. 69). Therefore, colonies will remain economically dependent producers of raw materials, or—to use Safarov's analogy—will be "attached" to particular types of raw materials just as serfs were attached to the land: "The national middle class will have nothing better to do than to take on the role of manager for Western enterprise" (Fanon, 1964/1967, p. 154). Moreover, Fanon was aware that while colonial rule by force is collapsing, the rising "middle-class bourgeoisie" of former colonies might easily provoke a period of inter-African wars (see: Fanon, 1964/1967, p. 186). The African countries, now emerging as formally independent nation-states, will compete with each other, triggering the wave of militant nationalism: "If the national bourgeoisie goes into competition with the Europeans, the artisans and craftsmen start a fight against non-national Africans […] From nationalism we have passed to ultra-nationalism, to chauvinism, and finally to racism" (Fanon, 1961/1963, p. 156). Of course, imperialists will use tensions between African countries trying to increase their dependency upon former masters, especially in relation to the cultural and ethnic differences of the northern and southern parts of the continent.

Taking all that into account, Fanon envisaged no place for the middle-class in the emerging African states: "The combined effort of the masses led by a party and of intellectuals who are highly conscious and armed with revolutionary principles ought to bar the way to this useless and harmful middle class" (Fanon, 1961/1963, p. 175). That's why he was proposing "African Unity", that is, "a principle on the basis of which it is proposed to achieve the United States of Africa without passing through the middle-class chauvinistic national phase with its procession of wars and death-tolls" (Fanon, 1961/1967, p. 187). As Derek Wright puts it, "the continentalist turned white racialisation of black identity to serve the purposes of a spurious cross-cultural unity" (Wright, 1986, p. 680). The racial boundaries will become the basis for the creation of a state that will unite the whole continent—though Fanon was aware of the differences between the northern and sub-Saharan parts of Africa, he believed that the common traumatic legacy of colonial rule will contribute to bringing different parts together. In addition, the slogan of the United States of Africa surely echoed the slogan of the European Socialist Democracy of the early 20th century, namely, the United States of Europe.

This new state will be strong enough to protect itself against the sweeping economic penetration of former colonial powers. Of course, that might result in a European blockade, aimed at throwing Africa back to the new Middle Ages and starvation without the access to European technologies, capitals and engineers. The

socialist alternative, though Fanon was rather sympathetic towards Soviet socialism, seemed inappropriate to him as well. He was skeptical towards any sort of the "Great Leap Forward" to spur industrialization in a single country: "Let's be frank: we do not believe that the colossal effort which the underdeveloped peoples are called upon to make by their leaders will give the desired results. If conditions of work are not modified, centuries will be needed to humanize this world which has been forced down to animal level by imperial powers" (Fanon, 1961/1963, p. 100). He emphasizes:

> There is no question of a return to Nature. It is simply a very concrete question of not dragging men toward mutilation, of not imposing upon the brain rhythms which very quickly obliterate it and wreck it. The pretext of catching up must not be used to push man around, to tear him away from himself or from his privacy, to break and kill him. No, we do not want to catch up with anyone. (Fanon, 1961/1963, p. 314)

Fanon saw colonial dependence not only as a system of subjugation, which permanently reproduces backwardness, but mostly as a psychological trauma, which means that colonial countries need no economic strategy of development but a psychological remedy. Here, the contrast with the Communist thought—be it Safarov's national-colonial revolution, or Mao's "new democracy"—is remarkably ostensible.

Conclusion

In answering the question of how the colonial revolution is possible, different authors, following the resolution of the 2nd Congress of the *Comintern,* developed similar approaches. The vision of a peasant, "plebeian", anti-feudal war along with the analysis of internal contradictions within the imperialist camp create for Safarov, Fanon and other authors the very possibility of victory. Fanon thought that the great *jacquerie* of colonial people against the powerful imperialist exploiters could be won due to the three main factors: the internal changes in the very social organization of capitalism; the specific spirit of freedom that inflames the subjugated (similar to the spirit of the Spanish guerillas who fought Napoleon); and the confrontation of socialism and capitalism that undermines the positions of the West. This triad is similar to the three factors of victory in Mao's "protracted war" as well as to the broader intellectual framework once set by the *Comintern* thinkers in the Interbellum: the combination of factors internal for the oppressed (partisan warfare); for the oppressor (weakness of Japan in Mao's writings and domestic changes in Western politics in Fanon's texts); and the overall context of international relations, in which the Soviet Union plays a special role. Colonialism was stripped of any progressive connotations and thought to be an ultimate evil perpetuating the backwardness of colonies. Thus, colonial revolution was reduced to the liberatory war against colonialism, and as such it no longer depended upon the revolution in the West; it was not even an issue of the colony's own economic development.

The social-economic development which was supposed to protect former colonies from an indirect "economic intervention" after the war remained a problem for the concept of colonial revolution all the way from Central Asia to Algeria. Everything that Soviet and Chinese thinkers could advise was forced economic development. Safarov thought that the solution was the direct economic support from the Soviet state, thus effectively replacing the expectations of the European revolution with the hope for Soviet assistance. Mao to some extent also relied on the help from abroad; nevertheless, the key issue of "New Democracy" was to use domestic capitalists to drive the economy forward under the strict control of the "democratic dictatorship". Later Mao also adopted the strategy of the "Great Leap Forward", and even after that remained faithful to the Stalinist-type planned economy. Fanon's dream of a large, united African state standing against the imperialists and reducing the chauvinist tensions resembles the visions of powerful communist states of the Soviet Union and China. However, he defied the idea of rapid modernization under the aegis of socialism—whether in the form of the "Great Leap Forward" or as a reliance upon the direct Soviet aid. Fanon also had no trust in the native bourgeoisie. Emphasizing the need for psychological change rather than for "chasing someone" technologically and economically, Fanon envisioned a different path, the one which eventually led to the emergence of the post-colonial paradigm with its focus upon cultural therapy rather that liberatory action, and on subalternity rather than oppression. Such interpretation of Fanon's ideas has been recently developed by Ranjana Khanna (Khanna, 2013, pp. 134–138). Arif Derlik summarizes it the following way:

> Escaping into the Second World of socialism, or "de-linking" from the system, were the only options available, and neither offered a satisfactory solution of the problems faced by colonial and neo-colonial societies. The first implied escaping one kind of colonialism to be entrapped in another, but without the structural integration that came with incorporation in capitalism, which at least brought some benefits with it. The other alternative meant opting out of the system only to be isolated, while leaving the system intact. (Dirlik, 2002, p. 435)

The formula of "another kind of colonialism" seems to be inadequate to grasp the proper relations within the socialist camp, but those former colonies and semi-colonies—for instance, Vietnam or Cuba—which entered the global socialist system in the 1950s surely were treated within the second tradition of orthodox Leninism, in which peripheral former colonies were seen as inferior and undeveloped—the same arrogant approach which enraged Enver Hodzha in his encounter with the Soviet leadership in Moscow. Regardless of the terms, the "escaping into the Second World" was not a simple option to choose or reject; such "escape" demanded certain historical, political and geographical conditions. Unlike the Soviet and Chinese cases, the wave of revolutions in Africa and Southern Asia mostly swept over the countries under direct control of colonial empires, while the Soviet Union was far away, both geographically and culturally. Even the victory in war left former colonies vis-à-vis powerful capitalist countries, which would be able to corrupt and indirectly control the

greedy and stupid native bourgeoisie. Development of the theory of colonial revolution was mainly connected with the *Bolshevik* Party, where it was also used as a part of international politics securing the safety of the Soviet Union, and with the Chinese Communist Party, where it opened the way for a victorious liberatory war and national revolution. It is important that these two states had a common border and, so to say, were territorially close to each other.

Fanon's rejection of accelerated economic modernization as incompatible with the essence of the colonial revolution—the great *jacquerie*—was not an isolated phenomenon. Sanjay Seth connects the emergence of post-colonial theory in India with the Maoist Naxalite movement in India rather than with the overall disappointment in socialism. Seth argues that by the mid-1960s, a new way of thinking about revolution had arisen,

> one more willing to use Marxism for a critique of Enlightenment, than to see Marxism as the culmination and fulfilment of Enlightenment rationalism; and one alert to the possibility that anti-colonial nationalism and the nation-states to which it gave birth may not have been the answer of the oppressed to their subordination, but yet another form of bondage to modern European knowledge and its forms of construing politics and community. (Seth, 2006, p. 603)

The Naxalites developed the extreme form of *jacquerie* but the post-colonial Indian thinkers like Homi Bhabha substituted the Maoist organization with the "denial of organizational policy", as "ambivalence is understood as the extent of politics" (Hutnyk, 2003, pp. 484–485). Not striving to "catch up with anyone", unwilling (or unable) to "escape into the Second World", post-colonial thinkers developed a specific strategy of complex relations with the former colonial powers, in which "the humiliated ones" would be able to pursue their own "counter-hegemonist" strategy. These relations were no longer determined by the sheer force of imperialists, and from that point Gramscian patterns became applicable to discuss and reinterpret transitional experience (Bentouhami, 2014, p. 118). As Arif Dirlik points out, "this new emphasis helps give voice to the victimized but, in the process of rescuing the colonized from voicelessness, also blurs the depth of the victimization colonialism visited upon its 'objects'" (Dirlik, 2002, p. 433). Indeed, nowadays, postcolonial theory is criticized from the position of decolonization for reproducing the colonialist structures of modernity with its strict division of object and subject (Tlostanova & Mignolo, 2009, pp. 130–132).

The theory of colonial revolution, which goes back to the 2nd Congress of the *Comintern,* presented colonialism as an ultimate evil, incapable of bringing any progress to its victims. Colonial revolution was theorized by those Communist authors of the 1920s who were inclined to find conditions under which such action could lead to a victory (Safarov was the most consistent there) as a national-liberatory war against the colonial regime that not only galvanizes everything reactionary and feudal in colonies, but also operates on the basis of sheer power—dreadnoughts and airplanes, without a proper social base or consent within the colony. In addition, the possibility to move directly to socialism was provided by the existence of the Soviet

Union, capable to help former colonies in economic, political, and military spheres. To win the war meant to succeed in the revolution, though—most probably—the ideas of Safarov and other Soviet thinkers were also motivated by the desire to improve the international positions of the isolated Soviet state. But with the theoretical and practical triumph of Mao, the strategy of a "protracted" peasant war became globally recognized; the theory of colonial revolution as a liberatory war turned out to be the working one. Both the USSR and China pursued forced economic development, striving to outperform the capitalists. But as the limits of the Second World were unable to broaden endlessly, the theorists of the new revolutions in colonies strove to discover a possibility to re-enter the relations with the former colonial powers. As we saw in the case of Fanon's deliberations on Europe's possible "reparations" to undo the damage done by the colonial regime, the radical break with the ex-masters was followed by entering the relations of hegemony, based on persuasion and consent rather than violent governance by the "great array of bayonets". These new relations were described in Gramscian terms of a long-term struggle over hegemony rather than in terms of forced economic build-up in the form of Stalinist industrialization or Maoist "Great Leap Forward". To sum up, the comparison of Safarov and Mao with Fanon shows how the theory of colonial revolution as a national-liberatory war outgrows its initial sphere of use, leading the colonial peoples from the rule of sheer violence either to spaces of socialist planned autarky or to counter-hegemonic hybridity within the globally reaching capitalism.

The historical-geographical peculiarities still influence the development of post-colonial studies. Today, the post-colonial thought is associated mostly with Southern Asia and Africa, the former colonies of British and French empires, while Russia and China as the former "Second World" and the key locations in the early development of the theoretical approach to colonial revolution are underrepresented in this field. When post-colonial studies emerged in the 1970s, the Soviet Communists, who once stood at the roots of this intellectual adventure, definitely lost sensitivity towards colonial issues, as illustrated by Aleksander Gordon's book on Fanon (Gordon, 1977). The subject of this book is the "national-liberatory struggle" rather than "colonial revolution"; the legacy of the *Comintern* is not mentioned at all, while Fanon is characterized exclusively as a "humanist"; his apology of violence is downplayed, and he is compared favorably with Jean-Jacque Rousseau. The subsequent collapse of the USSR and severe damage to the reputation of Communism changed things dramatically; on the one hand, the former Soviet Union is studied now among other colonial empires, and on the other hand, the former center of the "Second World" became part of the "poor North", borrowing Madina Tlostanova's term. The things are different in China. Recently, Daniel Vukovich pointed at the fact that the very post-colonial agenda in Chinese academia is different from the similarly named approaches in South Asia or Africa:

> The mainland intellectual political culture (to use a phrase from Said) is itself in many ways postcolonial in two fundamental senses. It is deeply concerned with "becoming-the-same" as the modern, advanced West (if not outperforming

> it and "winning") and with never forgetting—via education and propaganda institutions—the era of national humiliation, that is, the era of near-colonialism, the collapse of the dynastic system, disunity and chaos, and Japanese invasion […] Importantly, much of the Chinese new left also breaks with a major political plank in Western and global political thinking: it is resolutely pro-state and seeks to retain and enhance, not cut back or avoid, state capacity. (Vukovich, 2017, pp. 149, 153)

There is sound critique of post-colonial paradigm from the Chinese authors:

> It is not wrong that post-colonialism pays attention to "uncovering the secret" and "decoding" Western cultural hegemony. The problem is that it unilaterally emphasizes the importance of language on decolonization of thought and addicts itself to discourse, but cares little about the social, political, and economic system and other forms of social practice. (Yang & Zhang, 2006, p. 293)

The growth of China's technological and economic strength and its increasing "economic colonization" across Africa and Eastern Asia, which is yet to be considered through the lens of post-colonial theory, might become a decisive factor to re-evaluate the concepts of coloniality and dependence in the near future, so some new twists to the century-old tale of colonial revolution are to be expected.

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ARTICLE

Battles for Bandera: Dissonant Historical Narratives of Ukrainians in Poland and Problems of Integration

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ABSTRACT

The increasing flux of Ukrainian migrants into Poland increases the urgency of correlating Polish and Ukrainian historical narratives. Here, a key problem concerns the new pantheon of Ukrainian national heroes, some of whom are viewed quite negatively by many Poles. In this article, problems of competing historical narratives, as well as correlations between historical conceptions and models of migrant integration, are examined with the reference to field research carried out with Ukrainian migrants living in Poland. Here, the main sources comprised interviews with migrants, monitoring of formal and informal cultural activities organized for migrants, as well as data obtained via social networks, thematic forums and the expatriate press. It was found that the main factors determining strategies for facilitating interaction between historical narratives comprise the degree of inclusion of migrants living in different communities of the host country, as well as the level of cohesion among the migrant communities themselves.

KEYWORDS

cultural history, historical narrative, social memory, Poland, Ukraine

Introduction

In 2017, the annual visit of the Polish President Andrzej Duda to Ukraine began with a joint visit by the Polish and Ukrainian delegation to the memorial to victims of the totalitarian Soviet regime in the Piatykhatky neighborhood of the city of Kharkiv. An assessment of this period of history as comprising a socialist occupation by the Soviet Union is one of the few topics on which the views of Poland and Ukraine generally coincide. Since both countries shape their national

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identity through a narrative of victimhood to their larger, eastern neighbor (formerly the Soviet Union, now the Russian Federation), it may be possible for them to find common ground when assessing many historical events.

In many respects, Poland's 2003 accession to the EU became an example for Euromaidan, a 2014 protest rally in Kiev attended by thousands of people, whose success in toppling Viktor Yanukovych's more Russia-oriented government apparently fixed the country's course towards European integration. In this context, Poland's model of national identity formation has often been cited by Ukraine, albeit often without the necessary adaptation or consideration of historical specificities. Like Poland, Ukraine refers to the period of socialist occupation to declare itself a victim of the same totalitarian regime and construct on this basis a new pantheon of heroic freedom fighters. However, since many of the heroes of Ukraine are already included in the negative symbolic pantheon of Poland's enemies, it is precisely this pantheon that poses the main risk to Polish-Ukrainian relations. For instance, the Ukrainian nationalist theorist and independence fighter Stepan Bandera is primarily known in Poland as an initiator of acts of terrorism including the 1943 massacre of Poles at Volhynia. In turn, Poland's protests against commemorative practices associated with Stepan Bandera's name have provoked a hostile reaction from Ukrainian nationalists (Ukrainian nationalists, 2014).

In 2016, the Polish director Wojciech Smarzowski made the first film depicting the events of the Volhynia massacre (Smarzowski, 2016). However, following a decision by the Ukrainian government that cited the possibility of inciting social unrest, the film was never publicly screened in Ukraine. Moreover, some Ukrainian actors turned down a role in the film on the pretext of it being anti-Ukrainian (Luty, 2014).

Thus, it can be seen that history is not always simply a story about events taking place in the past but can also become one of the actors in current political and socio-economic processes. The "revanche of memory" observed by some Polish researchers (Machcewicz, 2012) transformed the socialist period into a new ideological and political battlefield. Now, due to the replacement of the ideological battles of the Cold War era with rival historical narratives affecting the contemporary political situation, a need arises to mitigate the potential for conflict through democratic discourse.

Once the prerogative of select intellectuals, history is increasingly becoming the object of everyday personal experience and collective interpretation. In democratic societies, this creates a situation in which it becomes necessary to take a strategic approach to emerging trends in collective representations. In addition to carrying personal and family memories, succeeding generations also refer to dominant official discourses (and sometimes their corresponding historiosophical models) when narrating their retained images of the past. In situations where conflicts arise between personal experiences and official interpretations, the ensuing combinations reveal often paradoxical interrelationships between collective representations and the influence of official discourses on them. In post-socialist countries, collective representations of the past that had been constructed under the influence of a socialist discursive model subsequently became part of a post-socialist critique (which, as a rule, turned out to have an anti-socialist character).

Since 2014, the number of Ukrainian migrants in Poland has been rising due to a combination of deteriorating economic conditions at home and opportunities offered by EU countries (special programs for Ukrainian students, visa-free travel, etc.) (Dobroczek et al., 2017). In 2013, Ukrainians received 1,694 residency permits and 9,795 temporary residency permits (which are valid for up to three years); in 2014, 3,484 and 17,103 permits were issued, respectively, while for the first nine months of 2015 alone, the corresponding figures were 4,570 and 21,872 (Office for Foreigners, 2019). As of July 1, 2016, Ukrainians held 31% of all Polish residence permits issued to foreigners. Of all Ukrainian citizens studying abroad, a third were attending Polish education institutions, while in the academic year 2014/2015 the number of Ukrainians in Polish universities was double that of the previous year (Stadnii & Slobodian, 2019). In the present paper, collective representations of the past are viewed as a source of environmental conflictogenity, while models of their adaptations are considered as one of the methods for adapting to a changing world. However, an analysis of considerable empirical data about Ukrainians in Poland, the influence of economic and political factors on migration flows, the gender and age composition of migrants, and relevant monographs (Brzozowska & Grzymała-Kazłowska, 2014; Grzymała-Kazłowska, 2015; Kindler, 2011; Mrozowski, 2003) has been omitted as outside the scope of the present study.

While their respective governments are setting up commissions to settle historical issues, around a million Ukrainians living in Poland are experiencing historical narrative rivalry with their host communities at the same time as having to construct, on an almost daily basis, a dialogue with these same host communities. Having few working models on which to such base a dialogue, the migrant communities themselves obtain and/or create models of interaction depending on their personal interpretations of the historical information received in their home country, their experiences of living in Poland, interactions with the wider social environment, etc. While there are numerous public organizations based in Poland aimed at helping Ukrainians to resolve economic and social problems (for a detailed analysis see Łada & Böttger, 2016), for these migrants, the interpretation of historical events remains a largely personal matter. Thus, while it is understood that most migrants are probably more concerned with finding a good job and solving bureaucratic problems than with the peculiarities of Polish-Ukrainian history, it is impossible to fully consider issues around the adaptation and integration of migrants without also taking into account the conflict-causing potential of collective memory.

Theory and Methods

The analysis presented in this article is informed by studies that deal with the influence of historical memory on the Polish–Ukrainian relations. A comparative analysis of contemporary political, economical, and social features of the contemporary phase of Polish-Ukrainian relations was carried out along with a consideration of Poland's foreign policy strategies towards Ukraine (Szeptycki, 2016). Other authors place an emphasis on how historical memory is manifested in political documents

(Mieliekiestsev, 2016) and the media (Allison, 2015), without touching upon individual impressions and perceptions or the influence of the state's politics of memory on the specifics of people's daily lives. Although various aspects of the Ukrainian migration to Poland have been studied in detail, the contemporary phase of the Ukrainian migration to Poland has not been covered in these works.

Thus, based on the particular case of Ukrainian migrants in Poland, the present article analyzes problems of rivalry between conflicting historical narratives in the context of intensive migration along with an examination of methods for reconciling the conflict potential of national histories in the context of currently intensifying exchanges between Ukrainians and Poles. Thus, we will attempt to demonstrate, on the one hand, how migration affects the reproduction of historical memory, and on the other, in what ways historical narratives determine the living conditions of migrants.

Sources

The present article reports on research carried out into the historical narratives of Russian-speaking migrants conducted between October and November 2017 in the Polish cities of Warsaw, Krakow and Poznan. The purpose of the research was to analyze methods of interaction between different forms of cultural memory, including conflicts arising in the course of this interaction, the boundaries of assimilation and acceptance of various perceptions of the past, the mechanisms of "tradition creation", as well as obliviousness to the past in the migrant environment and the influence of the cultural memory of the host community. The main sources comprised interviews carried out with migrants, analysis of formal and informal activities organized for and by migrants, as well as data obtained from social networks, thematic forums, and the migrant press. The study was supported by the *Centrum Polsko-Rosyjskiego Dialogu i Porozumienia* [Centre for Polish-Russian Dialogue and Understanding].

The paper presents the results of forty in-depth structured interviews carried out with Ukrainian migrants aged 20 to 47 years who have been living in Poland for between two and ten years. Of the informants, which comprised 23 men and 17 women, 20 were from Eastern Ukraine and 20 from Western Ukraine. Ten participants were students in Polish higher education institutions (of whom eight also had a job), nine worked in the service sector, five were entrepreneurs, four were housewives, five were employed in the education sector, five worked in construction, and two were currently looking for a job. When selecting informants, quota sampling was employed, which entailed simple random sampling. With the consent of the informants, the interviews were recorded by the author of the present article using a digital voice recorder. An interview location was selected by the informants (typically, a cafe or their own place of residence). When processing interview transcripts and systematizing the data, the author of the article paid attention not only to the semantic content, but also to common discursive constructions, wording and underlying opinions. As additional sources, were also included: observations made by members of informal migrant communities (*Emigrant Lyre* poetry gatherings, regular club events of Russian-speaking and Ukrainian-speaking communities, theme nights organized by the *Ukrainian House in Warsaw*[1],

[1] Український дім у Варшаві

Club of Ukrainian Wives[2], and others); an analysis of the content of social network groups and sites for Ukrainian/Russian-speaking migrants *Overheard in Warsaw*[3], *Poland for your own and our in Poland*[4], *Warsaw for Ukrainians*[5], *Typical Krakow*[6], *Our people Poznań*[7], *Poland: useful information, work, life*[8], *Work and life in Krakow*[9], *Ukrainians in Poland*[10]; news channels and outlets *Polsha24*[11]; *Life and work in Poland*[12], *Our choice*, a newspaper for Ukrainians in Poland[13]; publicly available data obtained from personal social media accounts and influencers on social networks.

Theoretical Foundations

The selection of theoretical foundations and methodological framework was determined by the purposes of the study. In order to study changes and transformations of images from the past, a methodological approach was required. In this connection, it became necessary to determine the impact of historical narratives on the integration of migrants, e.g., what difficulties may arise when the bearers of a certain image of the past find themselves in the middle of conflicting historical narratives (that is, when there is a transfer not only of people, but also of their ideas). Therefore, the methodological framework of the study was informed by the process-relational methodology of Jeffrey K. Olick, who suggested that memory of the past should be seen as an activity, a process in which changing practices are of great importance. In particular, Olick noted that the purpose of studying collective memory should be to understand "figurations of memory", i.e., changing relations between the past and the present, in which images, contexts, traditions and interests are intertwined, albeit not always harmoniously (Olick, 2007, p. 92). Moreover, the dynamics of cultural memory are largely determined by its intermediaries, whose actions result in memories being made public (Erll & Rigney, 2009, p. 2). Thus, it is argued that a cultural memory of a certain event does not exist in the mind as a stable and unchanging picture; rather, it is a "script" that is constantly being rewritten, only a few particular episodes of which at best have actually been "brought to the screen".

Second, some of Andrzej Szeptycki's ideas have been rethought in the context of the "mobility turn" concept developed by John Urry. As described by Georg Simmel, a migrant is generally considered as a "stranger" by his or her host community. Thus,

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2 Клуб Українських Жінок

3 Подслушано в Варшаве https://vk.com/sekret_warsaw

4 Польща для Своїх & Наши в Польше! https://vk.com/polskaforyou

5 Варшава для украинцев https://vk.com/wawa_ua

6 Типичный Краков | Krakow | Краків https://vk.com/typ_krakow

7 Наши люди Poznań, Познань https://vk.com/poznann

8 Польша: полезная информация, работа, жизнь https://www.facebook.com/groups/1444850238943158/

9 "Работа и жизнь в Кракове" https://www.facebook.com/groups/382529975458952

10 Ukraińcy w Polsce/Українці У Польщі https://www.facebook.com/groups/426062464109096/

11 https://www.polsha24.com/

12 https://in-poland.com/

13 Наш вибір

although living alongside the host community, a migrant does not fully participate in terms of that community's specific conditions of interaction (Simmel, 1908/2009). For this reason, in order to stabilize the relationship between migrants and their host communities, Bülent Diken proposes to inform an interpretation of the messages of "the Other" by taking a hermeneutic approach (Diken, 1998, p. 251). However, as we have seen in the context of Polish-Ukrainian historical dialogues, a migrant may be considered not merely as a "stranger", but also as an "enemy" (Simmel, n.d.). While some organizations may paternalistically depict Ukrainians as younger brothers who need help, Simmel emphasizes that conflicts between people and groups who have much in common are often more acute (Simmel, n.d.). Here, a paradoxical situation arises according to which, while Ukrainians may be deemed "close" in one relation (according to geographical and linguistic principles), they can also be considered by the Polish community as an "enemy" when it comes to certain episodes from the past. Therefore, the relationship between Poland and Ukraine can be seen as complicated not so much by the historical conflicts themselves, but rather in terms of a rivalry of historical narratives, whose goals are determined by current political agendas in terms of forging a respective national identity to underpin national unity according to existing historical narrative models. Ukrainian nationalism, which arises as part of an intense exercise in shaping national identity, conflicts with the Polish historical narrative. Following the accession of the conservative Law and Justice party to a dominant position in Polish politics, the latter also carries strongly nationalist overtones. Meanwhile, considerable experience of Polish-Russian dialogue has already accrued without relying on a bi-nationalistic model.

Before proceeding to analyze the obtained empirical evidence, a few more theoretical remarks are necessary. Following Jens Brockmeier and Rom Harré, historical narratives are considered to comprise a subtype of discourse (Brockmeier & Harré, 2001, p. 40). Despite the essentially descriptive nature of historical narratives in terms of stating what actually happened, their coherence is also reliant on certain explanatory models (Danto, 1965, p. 290). Thus, when ideas and images of the past serve as part of a historical narrative, this in turn presupposes the description of historical events within a representative form of historical knowledge that is affected by the present cultural and social context.

While a historical narrative may be transmitted through the education system, family or various media, problems arise concerning, firstly, that images can have various meanings in different cultural and social contexts, and secondly, that how they are transmitted depends on the specific agents involved in their transmission.

In a monograph, Pamela Ballinger describes the effect of history on identity in a situation of exile (Ballinger, 2002) in terms of the agency of a particular historical narrative. While Urry points to a decline in the primary importance of national identity in the context of a turn to mobilities (Urry, 2000, pp. 161–163), the Ukrainian situation may be seen as an exception to this tendency, since historical narratives underpinning their national self-determination still structure a number of Ukrainian cultural practices. Here we may also pause to consider the peculiarities of historical education in Ukraine. In most post-Soviet countries, including Ukraine, school history teaching is essentially

narrative based (Korostelina, 2010; Richardson, 2004). Thus, when studying a narrative of past events, children are generally inculcated with the ideologically correct (from the point of view of state actors) interpretation. In this connection, it can be observed that the state-approved Ukrainian historical narrative generally depends on an interpretation that is relevant to the current political agenda.

While the successful implementation of such an interpretive-narrative model of historical education may indeed lay the foundation for a national state identity, when such a model collides with an alternative narrative, not only does this hinder integration processes, but it can also form the basis of conflicts between migrants and their host community.

Historical Narrative Transfers: Integration Strategies

The most common strategy, which was adopted by twenty eight of the forty interviewed migrants and by the majority of participants in activities observed in the migrant communities, was to deny the existence of any such narrative rivalry. In general, this strategy was preferred by young people who had been living in Poland for several years. Although not implying that Ukrainians abandon their historical narrative upon arrival in Poland in order to replace it with a new one, the essence of this strategy consists in (a) minimizing the influence of past events on modern life and/or (b) denying any personal connection with past conflicts. Although this strategy may seem to broadly coincide with the foreign policy statements of the Ukrainian establishment (President Poroshenko, 2018; Ukraine, Poland in effort, 2017), this should not be interpreted to imply that the migrants are consciously repeating the rhetoric of the president of the country they left several years ago, but rather as constituting evidence of common cultural ground on which basis the political elite and the citizens of Ukraine select similar strategies.

Such migrants argue that, since such tragic historical events as the Volhynian massacre happened a long time ago, it is no longer necessary to pay them much attention:

- It's time to live for today [...], look ahead, not back [...] (F., 46).
- That's history [...], there are many bad things, but there are many good things as well [...]; it's time to stop these endless quarrels […] (F., 37).

Some called for a broader view of history that is not limited to Polish-Ukrainian relations:

- The Germans have also been treating us badly—so what? (M., 23).
- Volhynia is a regional conflict, it means nothing, there were many of them in history, what's the use in remembering that? (M., 29).

The same strategy can also be seen in admissions of the equivalence of different interpretations and thus the possibility of their coexistence. According to these informants, history turns out to be a property of the state, created by those responsible for enacting state policy and therefore to be treated as part of state ideology:

- Here, they can make films about anything they like (referring to the film "Volhynia") […] and we can name our streets as we please (M., 41).

- In Warsaw, they say one thing on the streets, while in Lviv they say another. That's okay (M., 33).

The informants in this case avoided giving any personal appraisal of historical events or heroes, emphasizing that the state (whether Ukraine or Poland) has the right to adopt the historical narrative that suits it best because no one really knows what actually happened in the past. Thus, in the terminology of Astrid Erll and Ann Rigney, the state acts as an intermediary in determining the possibilities of interpreting the past.

The second strategy is manifested in terms of maintaining a distance from the tragic events of the past:

- Neither I nor my relatives participated in that [Volhynia massacre] (F., 29).
- The UPA is not the whole of Ukraine (F., 21).
- I'm from another city/That's a thousand kilometers from me (F., 37).

Such a stance allows migrants to tell themselves that the film "Volhynia" does not concern them but describes other people with whom they have no connection. It is noticeable that those with other family histories can also employ this strategy: a person of Ukrainian descent whose Polish relatives suffered under Volhynia said that it would not help them if he was to somehow develop a particular attitude towards this event now. Therefore, this strategy allows the maintenance of a personal distance from memories of Polish-Ukrainian violence by negating the significance of the past. In such situations, as noted by Jeffrey K. Olick, it is not the image of the past that has changed, but rather the methods of its transmission under the influence of social practices (Olick, 2007, p. 93).

The main goal of denying the rivalry of historical narratives thus consists in a desire on the part of the migrants to reduce the possibility of conflict situations in the host country, i.e., not to become an "enemy" in Simmel's terminology. For such migrants, interpreting the events of the past is a less pressing issue than the need to find a good job and communicate with officials. This point of view is related to the informants' acquaintance with history. Even the youngest of the interviewed migrants spoke in terms of the unreliability of knowledge of their country's past. Concerning the narratives recalled from school textbooks, although they have retained a certain integrity over the last decade, those narratives broadcast through the media often put forward alternative interpretations that contradict previous ones; for example, while older relatives or friends can act as translators of the Soviet historical narrative, this narrative is criticized by contemporary Ukrainian history books. Due to the presence of such intermediaries, the past loses its ontological status in the accounts of migrants, proving to be as valid as fiction, because (this turns out to be a rather common phrase among Ukrainian and generally Russian-speaking migrants): No-one really knows what actually happened in the past. As one informant explained:

- Even if he examines all the facts and sources and develop his own point of view, another person will come along who has also studied everything, but he is going to have another point of view (F., 21).

In general, when participating in conversations about history, migrants kept changing the subject of discussion back to current political issues.

Thus, while migrants may be willing to establish a certain identity in which their original country's cultural memory is reconciled with their lived cultural reality, they make a great effort to keep this identity separate from the "cultural memory" itself in order to construct something less controversial on its basis. At the same time, they emphasize the dominance of elements of the lived cultural reality: they strive for integration, play up aspects that appear to them to be "Polish" (since their first day of arrival in Poland, girls acquire the "western" habit of shaking hands when making people's acquaintance, using Polish words in speech, etc.), as well as sometimes cultivating a new identity by trying on the stereotypical image of a Pole, all the while avoiding any topics associated with periods of conflict in the history of Poland and Ukraine. Conversely, cultural memory may maintain a dominant position for quite some time, not only due to its inherent nature, but also when reinforced by the negative attitude of some Poles towards the migrants as "Ukrainians", "newcomers", *zarabiający* (migrant workers who come for the sole purpose of earning money), etc. However, it can be noted from the primary data that the significance of actual cultural elements intensifies along with the degree of integration as the migrants' length of stay in Poland increases.

At times, informants' explanations for their attitude to the Ukrainian past were quite original: for example, one explained that he does not feel a connection with either Ukraine or Poland:

- I'm a cosmopolitan. That is, a rootless man [...] and the fact that I have been living for 26 years in the territory of Ukraine does not make me a Ukrainian (M., 29).

Another considered his social identity to be more important than his national one:

- I am a simple hard worker, and we have our own problems. That's why we do not bother each other with that political nonsense. A worker's life is the same everywhere! (M., 41).

Alternatively, a desire to explain the Ukrainian actions in Volhynia while maintaining a friendly attitude towards his Polish hosts led another informant to appeal to a common enemy by claiming that the Volhynia massacre was organized by Soviet special services disguised as Ukrainians.

As a rule, the main goal of migration is to improve one's financial and social situation. Therefore, in preparation for a move to Poland, migrants are more interested in finding out how to rent an apartment, pay for their phone or buy a car, than in "memory wars":

- Did Poland have any conflicts with the Ukrainians? I didn't know about that (M., 21).

However, since Ukrainians remain "strangers" to their host community (according to Simmel's terminology), the long-term, consistent implementation of the denial/minimization strategy turns out to be problematic. Since ideas and images from the past often have an all-too-real effect on conditions of mobility, ignoring them may lead to problems in terms of integration or adaptation. While migrants may claim not to be interested in historical narratives, the host community (especially such as in present-day Poland) cannot entirely avoid touching upon past conflict events. According to

some informants, questions about attitudes towards Volhynia and Stepan Bandera are more frequently encountered during interviews for obtaining a residence permit; as other informants noted, such interviews had not previously referred to assessments of historical events. The Euromaidan period is noted by some Ukrainian migrants as having been a high point in Polish-Ukrainian relations. At that time, many Ukrainians gave interviews in the Polish media concerning the situation in Kiev; by providing "firsthand" commentary on what was going on in Ukraine, they were able to dispel some negative stereotypes held by Polish people about their neighboring country. With the help of funding provided by the Polish authorities, various public organizations were established: Ukrainian World, under the auspices of the Open Dialogue Foundation and Euromaidan Warsaw; Ukrainian House managed by Our Choice Foundation; and the Friends of Ukraine Network. However, following the short-lived euphoria of civil solidarity and influenced by a new wave of Ukrainian migration and the return to power of the Law and Justice Party[14], Polish-Ukrainian historical conflicts started to regain their salience. One informant recounted an incident when she and a friend from Moldova were having a conversation in Russian. She stated that a Polish passenger stood up and, using offensive language, referred to them as Banderites and warned them not only to get off the bus but also to return home. Meanwhile, the other passengers did nothing. When describing this incident, the informant agreed with the negative interpretation of Bandera's image expressed by the Polish passenger but stated that it was not relevant to her since neither she nor her relatives had ever had anything to do with him.

Thus, while perceptions of the past may alter under the influence of various social factors, the merely superficial embrace of a Polish historical narrative is not a sufficient condition for successful integration. The notion that professed ignorance of history contributes to more successful integration does not hold water, since, despite declared efforts to leave history in the past, migrants are still confronted by history in the form of media, films, as well as neighbors who have been inculcated with different values. Therefore, some migrants (eight of those interviewed) agreed with the historical narrative of the host community. Usually, this was stated in the discourse of awareness:

- Only here I came to realize what swine we were" (M., 38).
- We were not told about this in school, but here it has become clear (F., 40).

In seeking to justify their adoption of a Polish historical narrative, the interviewed migrants sometimes referred to their own humanitarian education, which allowed them to draw an objective conclusion (regardless of the country in which they were educated). Others cited the education of a Polish spouse or friend; less frequently, to their own, self-directed study of sources:

- We must admit our historical mistakes (F., 33).
- I wasn't aware about that before, but now I understand why Poles do not like us (M., 28).

Thus, in the minds of migrants, the past is changing under the influence of the new social environment, as the studies of Olick and Erll & Rigney confirm (Erll & Rigney, 2009, p. 1; Olick, 2007, p. 113). In attempting to forestall possible conflicts with their

[14] Prawo i Sprawiedliwość

host community, migrants instead emphasize those common features that unite Poles and Ukrainians: the "Slavic soul", shared aspirations for national self-determination, etc. At the same time, historical events in which the Polish side failed to show itself in the best light (for example, the "pacification" of Galicia) are either not commented on or declared to be the result of Soviet propaganda. This point of view allows Ukrainian migrants to establish their integration into the Polish community and avoid harsh criticism of their homeland. The image of the Soviet Union (often extended to Russia) as a totalitarian empire that sought to set one nation against the other (Poles and the Ukrainians), violently repressing any manifestations of free-thinking (which largely corresponds to the contemporary politics of memory of the Polish people), is now being adopted by Ukraine to suit a contemporary political agenda. In extreme cases, this may imply a change to one's own family history, as in the case of a grandfather who was previously remembered as a participant in the Great Patriotic War (that is, part of the Soviet heroic pantheon), but is now viewed as a war criminal.

However, adopting a Polish historical narrative is not sufficient to save a Ukrainian migrant from being considered a "stranger". The informants who followed this strategy generally continued to regard themselves as Ukrainians and maintain contact with relatives living in Ukraine. Negative reactions to the informants' "eastern accent" (typical of native Russian, Belarusian and Ukrainian speakers who also speak Polish), whether encountered in shops, at work or in the treatment of their children (especially those already born in Poland), often expressed in the form of the denigrative *banderovtsy*, offends this group more than it does those who employ other strategies. Nevertheless, many Ukrainian migrants note that the root of this situation lies not with their Polish host communities, but rather with the more recent Ukrainian arrivals in Poland.

Thus, while perceptions of the past may change under the influence of various social factors, the embrace of a Polish historical narrative is not a sufficient condition for successful integration. An alternative strategy consists in maintaining a historical narrative that is characteristic of the country of origin. However, among the Ukrainians interviewed, only a few had chosen this model. This group, which criticized Poles for their simplified interpretations and reluctance to understand Ukrainian history, did not intend to stay in Poland permanently (although neither did they plan to return to Ukraine).

Such a strategy tends to be more typical of immigrants from the Republic of Belarus. Unlike Ukrainians or Russians, there are many Belarusians in Poland who have the status of political refugees. Like the Ukrainian migrants who had chosen to retain their own historical narrative, this group tends to perceive Poland as a country of temporary residence, thus orienting itself not toward integration but rather aiming at a more or less comfortable transitory stay in Poland. With their immediate circle of friends mainly consisting of their fellow citizens, their media landscape tends to consist of Russian- or Belarusian-language public posts on social networks. Even after receiving Polish citizenship, expatriates from Belarus often do not intend to settle permanently in the host country but either see it as a springboard for subsequent westward movement within the EU or a temporary respite before returning to their homeland in the event of a change in the political situation there. Since no atrocity

comparable to Volhynia can be found in Polish-Belarusian history, the informants propose that those with a poor grasp of the Polish language (and having a so-called "eastern" accent) may present themselves as Belarusians.

Unlike Belarusians, however, the Ukrainian expatriate community sees itself as highly disorganized and sometimes even divided. The lack of integration into existing or newly formed organizations on the part of more recent Ukrainian migrants (i.e., since 2014) may partially explain the lack of active propagation of a Ukrainian historical narrative in Poland. "I'm looking for a Ukrainian guy. Don't email me if you're a Banderite", wrote one young woman from Ukraine in a migrant social network group. While tolerant of migrants from other countries and inclined towards dialogue with their Polish hosts, Ukrainians are at the same time often intolerant of their own compatriots. While, despite their checkered shared history, they are often willing to abandon stereotypes associated with the Russians and Poles, some interviewees considered those who come from Western Ukraine to be aggressive, fanatical nationalists, while others refer to those from Eastern Ukraine as stupid, prone to alcoholism and ignorant of the Ukrainian language. Perhaps these conclusions, which the present author derived from communication with Ukrainians in informal migrant communities formed on the basis of interests rather than ethnicity, are relevant only to this particular group of migrants. Despite the current political situation, an analysis of rental ads and other communications with the mentioned circle of migrants demonstrated that a native of Lviv might prefer to share an apartment with a Russian than with a migrant from Dnipro (previously called Dnipropetrovsk). Despite the existence of many organizations aimed at helping Ukrainian migrants to integrate, many of the interviewed migrants tend to avoid their compatriots, instead (as especially typical for those with poor knowledge of the Polish language) gravitating towards Russian-speaking communities of interest. This leads to the propagation of only the most anodyne cultural images (national cuisine, popular culture, images from nature, literature).

Poles and Ukrainians: Close, but Not Together

Migrants tend toward the opinion that, despite the problems they will inevitably have to face, their adopted host country can provide them with the benefits that their home country cannot. Thus, while expressing regret at losing connections with friends who remained in home country, an interviewed Ukrainian migrant was glad never to have to deal again with state institutions. Although it is typical of both Russian and Belarusian migrants that distrust of the state does not prevent them identifying with their national culture, definitions of Ukrainian culture in recent decades continue to depend on the current political agenda and the residence of migrants. Therefore, a strategy that involves maximum integration into the host community (with a tendency to assimilation) seems the best option for them. In the given political and social situation, however, this turns out to be impossible due to the propagation of a Polish historical narrative that conflicts with its Ukrainian counterpart.

The research revealed few differences in the responses of migrants who had arrived on a work or education visa with those who were repatriating to Poland on

the grounds of Polish ancestry. Despite the latter stating Polish to be their native language (and consequently already being assimilated into Polish culture), they also strove to avoid narrative rivalry, sometimes choosing Polish narrative interpretations only following a long period of living in Poland. Indeed, in most of the studied cases, being of Polish origin had hindered the integration process, since these repatriates not only had to jump through the same hoops faced by all migrants but were also forced to somehow neutralize the conflict between their origins and the reactions of others who defined them as Ukrainians. The more repatriates considered themselves to be a Pole, the more disappointment they expected to encounter when dealing with local residents. Informants stated that, even if they knew the Polish language as a mother tongue, they would still not be able to understand Polish humor and would have to face the negative attitudes of those they encountered (e.g., university professors and local residents). An anticipated correlation between informants' previous place of residence and their chosen strategy was not found: migrants from both Eastern and Western Ukraine, who used the Russian or Ukrainian language during interviews and in communication with their compatriots, responded similarly to the interview questions.

Nevertheless, the immediate environment of migrants does have an influence on their choice of strategy. An analysis of social network accounts showed that the more connections the migrants had with their host community, the more they were likely to agree with the Polish historical narrative. Those informants inclining toward this strategy were either in mixed marriages (80 percent of those who supported Polish historical narratives) or had Polish co-workers. Among the migrants from Russia, while a number of divorces had occurred as a result of anti-Russian narratives, no informants reported the possibility of maintaining neutrality in relation to "battles of memory". According to existing research, the fairly widespread practice of intermarriage between Poles and Ukrainians tends to result in the assimilation of Ukrainian migrants rather than their integration (Brzozowska & Grzymała-Kazłowska, 2014; Górny et al., 2007). Some Ukrainian migrants mentioned in interviews that Poland had become their home following the birth of their children in this country.

In the current situation, one can point to the emergence of a "migrant workers community", whose members are united by lifestyle and social roles rather than ethnic origin. Labor migrants (*zarobitchany*), who make up the bulk of those coming from Ukraine to Poland, are neither particularly concerned about competing historical narratives nor generally oriented toward integration. Nevertheless, their behavior may be an additional reason for growing Polish anti-Ukrainian sentiment.

Some Ukrainian informants who had been living in Poland for more than five years noted that they had only started to experience hostility on account of their nationality in recent years. In detailed interviews, while only three stated that they had encountered explicit cases of ethnic discrimination, all of them mentioned hearing stories of such discrimination from his or her acquaintances, who in turn had heard them from other people. Given additional comments in thematic communities, the level of anti-Ukrainian sentiment can partly be explained in terms of the migrants' own attitudes, which can be seen as a reaction to the growth of such sentiments in the media.

Due to their ever-increasing number, Ukrainian students, as well as those working in the service sector, childcare, or education services, cannot fail to influence their host community. In parallel with the patriotic policies introduced by the Polish Law and Justice Party, the growth in the number of migrants has resulted in an increase in nationalist sentiment among Poles.

Conclusion

On the basis of an empirical study, the interactions of migrant historical narratives with those of the host community were traced in terms of competition and conflict. Despite frequent denials on the part of migrants that their successful integration into the host community is impeded by competing historical narratives, one of the main impediments to abandoning their own historical narratives consists in the negative reactions on the part of their host community. The main factors determining the strategies on the part of the migrant communities in terms of managing the interaction of their own historical narratives with those of their host communities are the level of their integration into those communities and the extent of their internal cohesion.

Taking into account the influence of the collective memory of the host community, the study reveals that the changing nature of historical conceptions should be considered according to a conceptual framework that is not only capable of describing the potential conflicts between historical narratives, but also offers a means for their possible resolution.

The axiological character of historical narratives, both on the part of Ukrainian migrants, as well as their Polish hosts, leads to difficulties in terms of their possible reconciliation. The results of the empirical study show that, while some of the migrants are happy to forget about their history and national identity, they are continually reminded of it by their host community. Thus, instead of reducing identification with a national historical narrative, the migration context tends to intensify it.

For migrants, it is not always easy to simply leave the past behind, since it lurks in the speeches of politicians and puts words in the mouths of people sitting beside them on public transport. Integration strategies on the part of Ukrainian migrants in Poland cannot be analyzed purely in terms of the activities of two actors (i.e., migrants and host community) due to the presence of more than two actors. Thus, it is necessary to consider migrant integration and assimilation not only in terms of the amount of time they have lived abroad or the place they have come from (Schiller, 1999; Stack, 1996), but also in terms of their self-identification, in which attitudes to the historical narratives of their country of origin play a key role.

The present study has focused on the role of historical narratives and the extent to which attitudes towards them lead to heterogeneity on the part of migrant communities. In the context of rivalry between historical narratives, the study of the relationship between migrants and their host community permits a return to the notion of migrants having their own views and values rather than comprising mere demographic shifts. When studying mobilities, the relevance of the obtained results is increased by including the migration of ideas. The study has shown that sharing a common physical

space does not automatically lead to the formation of a community of common destiny, but that migration in the context of rivalry between historical narratives exacerbates problems of identity both for the migrants and the host community. This increases the potential for conflict situations, whose resolution nevertheless requires an appeal to the axiological base of identity. In this way, perhaps "strangers" will not immediately become "natives", but neither will they necessarily remain "enemies".

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ARTICLE

The Value of Work-Related Uncertainty: Changes from Demands on Certainty to Finding Ways of Living in Uncertainty

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ABSTRACT

Given the negative consequences that excessive confrontation with uncertainty can have, its positive dimension is often forgotten. The aim of this article is to show that the uncertainty associated with work, working conditions and the context in which working relationships are formed can be considered as a positive value. This will be shown through four themes. The first theme concerns the economic system. It is important to show that a certain degree of insecurity is necessary not only for individual freedom in society, but also for society as a whole, as there is a relationship between economic and political freedom. The second theme concerns entrepreneurship. In this respect, the article reminds us that uncertainty is a prerequisite for entrepreneurial activity. The third area deals with employment. Uncertainty and the life experience associated with it is an opportunity for personal development and the search for innovative ways of coping and solving problems, moreover, it is related to a sense of freedom. The fourth theme deals with the positive role of uncertainty in the context of the current crisis caused by the COVID-19 pandemic. However, this positive value will only emerge if human health is protected.

KEYWORDS

freedom, risk and uncertainty, sociology of work, value of uncertainty, work uncertainty

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Introduction

This article deals with the two important sociological concepts, which are also discussed in philosophy: uncertainty and work. Work is a significant sociological phenomenon that has had a large impact on the formation of social reality throughout history. The concept of uncertainty is not yet properly analysed, because much more attention is given to risk, which is usually connected to quantifiable indicators (Knight, 1921). Risk and uncertainty are always situated in a social context, and sociology shows how the definition of these phenomena "shape social relations and distribution powers to groups, at the same time as other groups are excluded from decision making" (Lidskog & Sundqvist, 2012, p. 1019).

This article focuses on how attitudes to uncertainty transform working relationships, especially in the context of freedom. It turns out that society is transitioning from excessive adherence to certainty, caused by negative experience during the early form of capitalism, to finding ways to live in uncertainty. Work uncertainty and other work-related uncertainties have a positive dimension and thus represent significant value. This article aims to show three levels where uncertainty can be considered a value in relation to work: the level of the economic system, which affects freedom to choose an occupation; entrepreneurship, where uncertainty is a prerequisite for business and economy in general; and finally, employment, where uncertainty is necessary for a sense of freedom and for the possibility of development.

The first part of the article will connect uncertainty with a related phenomenon—risk. The following sections will discuss the positive role of uncertainty at the level of the state, entrepreneurship and employment. Then, it will be shown how these themes are now gaining more urgency in the context of the current COVID-19 pandemic, which offers a space for reflection on uncertainty and its consequences, whether negative or positive.

Risk and Uncertainty in our Society

The real world around us is a place where we can seldom meet with certainty. Uncertainty is a much more complicated phenomenon; it is sometimes understood as a general term that includes several phenomena related to the uncertain nature of the world. In the scientific disciplines that deal with decision-making, the term "risk" is used to described those forms of uncertainty which are amenable to quantification of the probability that certain events will occur in the future. This basic distinction between risk and uncertainty is found in economic disciplines (Knight, 1921).

Risk, sometimes referred to as expected uncertainty, is examined in different disciplines and is viewed through various epistemological approaches. As Rolf Lidskog and Göran Sundqvist (2012, pp. 1020–1021) argue, the question arises as to whether risk has physical characteristics that exist independently of the social and cultural context, or whether risk is shaped and constructed by that context. Experts in their risk analysis aim at assessing actual threats by evidence-based scientific investigation. As a result, their risk analysis can be described from the

realist perspective. On the other hand, the general public in their risk assessment are often influenced by the social context and communication processes that can amplify risk perceptions or reduce them. Therefore, the latter can be understood from the social constructivist perspective.

As Jens O. Zinn (2008, p. 173) shows, risk is also understood in theories as a way of dealing with uncertainty. In this context, it is a question of how these uncertainties are rationally managed, and individual theories differ not only in their approach to this rationality, but also in the way risk is measured.

In some social sciences, the division between risk and uncertainty is not strictly conceptualized. At the level of ordinary language, the terms "risk" and "uncertainty" may be used in similar or identical contexts. We often find that we talk about risk in terms of a potential threat without determining any degree of probability. Similarly, some concepts of risk perception, such as a culturally oriented approach, have little to do with probability calculation (Lupton, 2013, pp. 9, 10).

Sjöberg et al. (2004, p. 7) distinguish risk per se and the engineered risk. The latter can be measured but cannot be overused in risk management. Paul D. Windschitl and Gary L. Wells (1996, p. 343) emphasize the fact that uncertainty is a psychological construct and exists only in the human mind, because if human knowledge were complete, nothing like uncertainty would exist. According to Sjöberg et al. (2004, p. 7), risk is closely linked to uncertainty, and it is psychological uncertainty that is important for understanding human responses to situations whose consequences are unknown.

In addition, it should be borne in mind that epistemic uncertainty also comes into play when making decisions, which means that the decision-maker does not have to be confident about the estimated probabilities (Müller, 2016). Sven Ove Hansson (1999, p. 539) realizes that while the distinction between risk and epistemic uncertainty is useful, it is not very clear how to distinguish the two categories. Hansson illustrates this situation with the example of a meteorological forecast. If there is 50% probability of rain tomorrow and we believe this prediction, it will be a matter of risk. On the contrary, if the probability quantified for us by meteorologists is not credible enough, it will be a question of uncertainty. People realize that experts who make predictions can very easily be wrong. We can very rarely approach the probability available to us with certainty. Hansson concludes that risk basically occurs only in textbook examples, such as a coin toss or dice (Hansson, 1999, p. 539).

Uncertainty related to work in this article applies to all the situations where it is not possible to estimate the future development of the labour market due to the complexity of the environment, as well as situations where labour market actors feel uncertain, despite the probability of remaining in the job position. Ulrich Beck also describes this world of uncertainty in his "risk society". He points out that risk is a hybrid entity, as it is both a real danger and something completely hypothetical, based on a social construction related to an uncertain future (Beck, 1986/1992; Zinn, 2008, p. 179). Today's world, shaped by modernization and technological development, there is increased uncertainty in the labour market. Jobs that are

widely spread today will not exist in the future, and on the contrary, completely new jobs will appear. It is natural for people to worry about the future, nevertheless, in the following sections I will argue that uncertainty is not entirely negative but also has a positive value.

The Case of an Economic System

Various texts in the fields of political philosophy, sociology and economics use terms such as "freedom", "economic certainty", "uncertainty" and "risk". These terms are used in different contexts and with different meanings. In this section, I will argue that uncertainty and risk, if we consider the possibility of some quantification, can to some extent be understood as a price to be paid for democracy, related to the uncertain nature of the capitalist society. In this light, the discussion between the advocates of a centrally planned economy and advocates of capitalism is worthy of interest. To show the difference between these terms, we can use the text by Friedrich Engels (1880/1908) *Socialism, Utopian and Scientific* and the text by Friedrich August von Hayek (1944/2001) *The Road to Serfdom*, where he criticizes socialist planning.

Engels' argumentation in favour of a centrally planned economy includes an attack on capitalism, in particular the uncertainty associated with life in a capitalist society. The struggle between individual capitalists is, according to Engels (1880/1908, p. 110), "the Darwinian struggle of the individual for existence transferred from Nature to society with intensified violence," and despite the long human history, "the conditions of existence natural to the animal appear as the final term of human development". The society is torn by the constant repetition of business cycles. According to Engels, the anarchy of production is the cause of this "vicious circle", or better, of the "spiral" that must come to an end. The business, credit, and speculation steeplechase lead to a collapse and, as a result, one must be liberated from the recurrent economic bankruptcies (Engels, 1880/1908, p. 110). Manufacturers merge, regulate production, determine the amount of production and the selling price. This, according to Engels, leads to the situation where the whole industry "is turned into one gigantic joint-stock company" and "internal competition gives place to the internal monopoly of this one company" (Engels, 1880/1908, p. 120). Within monopolies, exploitation is so obvious that it must result in their collapse. The state must therefore take over production control.

The industrial reserve army is a regulator that keeps wages as low as is suitable to capital needs. Only the revolution to which history inevitably tends can restore the proletariat to human dignity:

> With the seizing of the means of production by society, production of commodities is done away with, and, simultaneously, the mastery of the product over the producer. Anarchy in social production is replaced by systematic, definite organization. That struggle for individual existence disappears. Then for the first time, man, in a certain sense, is finally marked off from the rest of the animal

> kingdom, and emerges from mere animal conditions of existence into really human ones. (Engels, 1880/1908, pp. 133–134)

Engels is convinced that people will become masters of nature because and they are able to consciously manage the conditions surrounding them. In this socialist world there will be no place for uncertainty. According to Engels (1878/1987), freedom consists in the control over ourselves and over external nature, a control founded on knowledge of natural necessity. People will be masters of the forces that have so far dominated them, making a leap from the realm of necessity to the realm of freedom. The proletariat through the revolution will liberate the world (Engels, 1880/1908, pp. 135–136). For Engels, the uncertainty associated with capitalism is thus an obstacle to freedom, which he sees as liberation from uncertainty. This planned organization also involves work. Karl Marx argues in following way:

> We also saw that capital, in the social production process appropriate to it—and the capitalist is simply personified capital, functioning in the production process simply as the bearer of capital—pumps out a certain specific quantum of surplus labour from the direct producers or workers, surplus labour that it receives without an equivalent and which by its very nature always remains forced labour, however much it might appear as the result of free contractual agreement. (Marx, 1894/1993, pp. 957–958)

Therefore, according to Marx, society needs to achieve freedom that "can consist only in this, that socialized man, the associated producers, govern the human metabolism with nature in a rational way, bringing it under their collective control instead of being dominated by it as a blind power" (Marx, 1894/1993, p. 959).

It is evident that this concept of freedom takes on a somewhat different character than that of freedom, as understood in a democratic society. Hayek (1944/2001, p. 46), as a supporter of liberalism, rejects central planning and draws attention to the danger of a socialist program that seeks to remove uncertainty from society. He points out that planning advocates regard planning as a necessity, as circumstances caused by free competition are beyond our control. However, their claims are not supported by enough arguments but only by reference to past authorities. The monopolies, which are often called a necessary product of the development of capitalism, were in fact the result of a government policy, "a conscious organization of industry" and "scientific planning". According to Hayek (1944/2001, p. 48), this has been the case in Germany since 1878. Protectionist policies in the USA have had similar consequences.

According to Hayek, effective control or planning of a system might not be difficult if the conditions were so simple that a single person or a commission doing the planning could actually take into account all the relevant facts. However, the real situation is much more complicated—information is necessary for decision-making, and a pricing system based on well-functioning competition is a suitable mechanism, which provides information on all minor changes (Hayek, 1944/2001, p. 57).

> To direct all our activities according to a single plan presupposes that every one of our needs is given its rank in an order of values which must be complete enough to make it possible to decide between all the different courses between which the planner has to choose. It presupposes, in short, the existence of a complete ethical code in which all the different human values are allotted their due place. (Hayek, 1944/2001, p. 60)

However, the problem arises that we have no such universal value scale and that it is "impossible for any mind to comprehend the infinite variety of different needs of different people which compete for the available resources and to attach a definite weight to each" (Hayek, 1944/2001, p. 62). For Hayek, individualism is based on the fact that more than one section of the needs of society as a whole cannot be included under our value scale.

The goals of public well-being should not be achieved at the expense of freedom. Hayek (1944/2001, p. 69) points out that it is not necessary to completely abandon the idea of economic certainty, but it should be borne in mind that if the entitlement to social certainty is understood in an overly absolute sense, this becomes a great danger to freedom. Limited certainty for all, which does not jeopardize general freedom or prepares for accidental life risks, is acceptable. However, it must be ensured that these measures do not destroy competition. A state that provides more security does not, according to Hayek, suppress individual freedom. All economic activities are related to planning, but it is not possible to accept the situation where planning is used to replace the market.

Central planning takes a dramatic form in the context of work. Rewards commensurate with the objective outcomes of human endeavour are incompatible with freedom of choice:

> In any system which for the distribution of men between the different trades and occupations relies on their own choice it is necessary that the remuneration in these trades should correspond to their usefulness to the other members of society, even if this should stand in no relation to subjective merit. (Hayek, 1944/2001, p. 126)

If we want to guarantee an unchanging income to everyone, it is necessary to abolish the freedom to choose an occupation, which is inadmissible, since the reward would have nothing to do with the benefits. People must be motivated to work—they perform better if they are guided by their own interests. The planned economy is moving towards a situation where discipline will be ensured by corporal punishment—the highest threat is no longer the bailiff but the executioner (Hayek, 1944/2001, p. 130). The failure of an individual becomes a crime against society, certainty is redeemed by freedom.

Every decision-making is associated with risk and if we want to get rid of risk, we must also take away the possibility of making a decision. Hayek (1944/2001, p. 137) admits, however, that a certain amount of certainty is necessary to preserve freedom,

since most people are only willing to bear to some extent the risks that freedom necessarily entails.

At first glance, it might seem that this comparison of dramatically different concepts is not up to date in the current debate, as we are now living in the world of mixed-type economies where the shortcomings of the market mechanism are corrected by the public sector. The relationship between freedom, uncertainty and risk is therefore not usually so dramatic. However, there are still views that words such as "communist" and "democratic" are not mutually exclusive and are compatible, although this has been debated in many studies (see: Friedman, 1962/2002). The discussion of the relationship between risk, uncertainty and the fundamental values of a free society is still significant. Given the current societal challenges, we must constantly seek acceptable levels of risk and uncertainty.

The Case of Entrepreneurship

In the capitalist society, uncertainty with its dynamic changes in the real world leads entrepreneurs to seek profit and try to avoid losses. Without this important role played by entrepreneurs it would not be possible to talk about a functioning market, and economy where economic calculation is possible. According to von Mises, a real economy without calculation is not possible. The world of certainty described in the previous section is deprived of any motive for doing business (see: Rothbard, 1991; von Mises, 1949/1998, pp. 694–705). Ludwig von Mises is even more radical in his arguments than Hayek and shows that a centrally planned economy is not only flawed but in principle impossible (von Mises, 1920/1990).

Murray N. Rothbard (1991) notes that the collapse of socialism and the centrally planned economy is currently perceived in the context of a catastrophic economic failure, but decades ago, in the midst of debates about the nature of a socialist economy, the prevailing view was that the major problems of socialism are not economic. A frequently discussed topic was, for example, socialist efforts to transform human nature (see: Camus, 1951/1956). But in 1920, economist and philosopher Ludwig von Mises came up with an original critique of a centrally planned economy based on economic calculations. In his article *Die Wirtschaftsrechnung im sozialistischen Gemeinwesen* [Economic Calculation in the Socialist Commonwealth] (von Mises, 1920/1990) he demonstrates that freedom, property and sound money are the necessary and sufficient conditions for the existence and evolution of human society (see: Salerno, 1990). In his reasoning von Mises is so prescient that he responds to the objections raised later (see: Lange, 1938 p. 70).

As Joseph T. Salerno observes (2014; see also Salerno, 1990, p. 44), von Mises points out that even if planners are not burdened with the knowledge problems Hayek emphasizes, they will still not be able to determine how to allocate factors of production or calculate optima. Allocation decisions are overwhelmingly complex as planners will be confronted with changed conditions at all times. The quantity and quality of productive services is subject to constant change as these services originate in a stock of gradually transformed physical assets and work capabilities.

In the context of work, planners will never be able to plan working relationships and determine who, when, where and how to produce. And it is precisely the uncertainty that leads entrepreneurs to modify individual relationships and seek new, better solutions to current situations, and at the same time, they are motivated by profit.

The pricing system is not the most important thing, as Hayek points out, but the result of previously achieved prices that are based on valuations—mental operations. These prices are an instrument of economic analysis, which is not a means of acquiring knowledge, but a prerequisite for rational action. The existence of an economy, therefore, requires entrepreneurs who carry out the calculations, and these calculations cannot be replaced by any organized plan, or by the use of computation technologies. The real world is dynamic, filled with change and uncertainty. Uncertainty leads entrepreneurs to seek profit. The role of the entrepreneur who deals uncertainty is essential for capitalist economy.

Von Mises (1949/1998, p. 700) points out that the entrepreneur does not know whether his business will be successful, and thus finds himself uncertain. This method can be described as a trial-and-error method. Socialists believe that this method can be imitated, but in a socialist economy, profit and loss calculation is not possible. Von Mises (1949/1998, pp. 701–702) also points to the absurd efforts of neo-socialists (such as Lange, 1938), who first destroy all the characteristics of the market and then try to artificially organize society as if "the market", competition and so on existed. These socialists want, says von Mises, people to play at the market without realizing how this game is different from the reality. Von Mises points out (1949/1998, p. 704) that the great error of socialists is that they view economic problems from the point of view of subordinate officials who cannot see beyond their specific entrusted tasks. Thus, in the eyes of the socialists, the allocation of capital and the structure of industrial production is something unchangeable and the need to change this structure is overlooked. According to the socialists, economic history is in its final stage. But managerial activities, as von Mises shows, are only a small part of the market processes. Von Mises argues that one cannot play speculation and investment: "The speculators and investors expose their own wealth, their own destiny. This fact makes them responsible to the consumers, the ultimate bosses of the capitalist economy" (von Mises, 1949/1998, p. 705).

Max Weber (1921/1978) develops Menger's ideas in the field of economic sociology, and, like von Mises, points out the problem of calculation in non-monetary economies. As Stephen D. Parsons shows, "Weber argues that entrepreneurs make production decisions under conditions of uncertainty, where the goals of action are subject of choice and where the consumer wants to be formed through entrepreneurial action" (Parsons, 2020, p. 149). Moreover, according to Weber, entrepreneurial activity related to rational choice is associated not only with the sense of freedom, but also with the responsibility for individual choices (Parsons, 2020, p. 160; Weber, 1919/2004, p. 92). Here we return to the ethical problems that were mentioned in the context of a centrally planned economy. Freedom is possible only in the context of uncertainty, which is a precondition for the freedom to choose an occupation, but also for one's responsibility for their actions.

The Case of Employment

Vicki Smith (2016) in her review of the findings related to sociology of employment risk and uncertainty deals with the question of what social structural conditions may lead someone to consider employment risk and uncertainty perceived as an opportunity. This question brings us again to the positive value of uncertainty, and to another level that we examine in this article—the level of employment. Smith mentions that "for sociologists of work, a core puzzle has been why some individuals and groups are positive about employment risk and turbulence, even seeming to favour it to the point of endorsing popular 'free agent' and 'entrepreneurial' ideologies" (Smith, 2016, p. 70). According to Smith, it is fascinating that the research on employment uncertainty has led to the discovery that some groups of people prefer constant change and uncertainty about employment and are able to accept uncertainty about their future job opportunities. This raises the following questions: "Are they irrational, incapable of understanding how they are being used by employers? Do they fail to recognize that corporations will callously dump free agents at a moment's notice?" (Smith, 2016, p. 370). Before turning to our own psychological analysis of the positive value of job-related uncertainty, we first summarize the studies where Smith (2016) finds the answer.

Smith explains "that people's willingness to embrace risk and unpredictability—to view uncertainty and constraint as opportunity—is conditioned by institutional context and material practices". To illustrate this point, she uses as an example the observations of Wall Street Banking Firms by Ho (2009), media workers in Manhattan's Silicon Alley by Neff (2012) and cases of project-based work. With time, employees get used to the corporate layoff strategy and employment culture that uses the rhetoric stating that layoffs and continual change are industry-specific and remain on the constant lookout for new job opportunities. In addition, short-term employment—and risk-taking—can be offset by financial remuneration (Ho, 2009, p. 224; Smith, 2016, p. 371). The analysis by Gina Neff (2012) is also worthy of interest in relation to work uncertainty. Research has shown that media workers regard their job decisions as a series of investments that will stimulate their firms' success. These workers were willing to take risks and work for unknown and start-up companies. Moreover, they were willing to accept poorly paid work or unpaid internships. As Smith writes:

> Experiencing turbulence and unpredictability from such an advantaged location makes it possible to emphasize positive discourses about the advantages of risk and opportunity, praising and seemingly embracing it: to rationalize away fears and concerns about periods of unemployment; to view oneself as being in control of one's destiny; and to maintain individualistic perspectives on personal successes. (Smith, 2016, p. 371)

Neff (2012, p. 37) points out that these workers were able to "convert uncertainty into opportunities for wealth and advancement". A similar situation is also observed

for workers working on projects in the creative industry, where workers are exposed to fierce competition in uncertain conditions. Smith (2016) notes that:

> These workers eschew attachment to one firm or one employer, undermining conventional sociological arguments that job stability and commitment alone can explain why workers work hard and put in quality effort. Their experiences also undermine conventional expectations that workers prefer long-term jobs and continuity. (Smith, 2016, p. 372)

A guidance to understanding preferences can be found in the research by Debra Osnowitz (2010), who conducted interviews with contract professionals. These professionals experienced negative aspects of the work conditions as permanent workers such as management abuse, blocked mobility that led to feelings of uncertainty, while contracting gave them an illusion of certainty.

There is another explanation for why job uncertainty may be perceived as an opportunity that is related to Osnowitz's observations. This explanation could be based on the ability of employees to perceive differences between social contexts and their consequences. However, in these considerations we move from the sociological to the psychological level of analysis, because in addition to social determinants, psychological determinants related to employees' specific cognitive abilities and personality must also be taken into account. We need to talk not only about the social conditions that can transform uncertainty into an opportunity, but also about the personalities of people who tend to seek such conditions. One could say that certain professions are more acceptable to certain personality types of people, e.g., those who are better at working with risk and uncertainty. In the previous section we mentioned entrepreneurs and it was pointed out that in a socio-economic perspective, uncertainty is considered as a prerequisite for a given type of activity. Some people may seek out uncertainty directly because the sense of certainty also has its negative side, such as routine and repetitive work leading to overall stagnation.

Managerial work is associated with all sorts of uncertainties and turbulent changes in a globalized society. All management textbooks begin with the characteristics of managers' personalities. Being a manager means being confronted with uncertainty. One level of uncertainty relates to success in individual activities that fall under the managerial competence. The second level, which is closely related to the first, concerns the possibility of losing job in the event of misconduct, which implies the risk of unemployment. Research shows that successful managers confronted with uncertainty and with states when habitual ways of doing things cannot be taken for granted reconsider—deconstruct—uncertainty to see new opportunities (Müller & Jedličková, 2020; Rolfe et al., 2016; Rolfe et al., 2017).

Critical situations associated with the so-called existential disruptions—situations where habitual ways of doing things are threatened (Müller, 2019; Rolfe et al., 2016)—and the uncertainty associated with them provide an important context for the process of becoming a manager. Facing uncertainty and responsibility both for the future

progress of the company, but also for one's own uncertainty about the manager's job leads to self-awareness of the manager's own identity (Müller, 2020). Even managers who, in the context of a critical situation in a company, decide to change jobs and face uncertainty, describe this moment as liberating and reinterpret the crisis in positive terms (Müller, Jedličková, & Halová, in press). Existential approaches to management show that an important ability of a manager is to adapt to the constant alternation of success and failure, reminiscent of the Sisyphean struggle described by Camus (Müller, 2021).

Greater willingness to face work uncertainty can also be seen in the younger generations, as evidenced by the data from sociological and demographic research: generations Y and Z are more willing to change jobs and have different work preferences than older generations (see: McCrindle, 2014). This situation illustrates the interaction of social conditions and the psychological (or biological, if we go to a deeper level of analysis) development of individuals who choose a certain type of employment—especially in the creative industry, social media, technology start-ups, and so on. It is possible that going through the process of education under uncertain conditions associated with constant change develops one's ability to reinterpret uncertainty as an opportunity.

Understanding uncertainty and the ability to manage its manifestations is an important prerequisite for the self-development of managers and knowledge workers (Müller & Kubátová, 2021). Another level may be the perception of freedom, which in the deterministic world depends on uncertainty, because without uncertainty, there would be no hope, ethics or freedom of choice, because all this is possible only because we do not know what the future will bring us (Hastie & Dawes, 2010, p. 333).

Work-Related Uncertainty in the Context of the COVID-19 Pandemic

The current period associated with the COVID-19 pandemic is the greatest reminder of uncertainty in modern history. It shows both the negative and positive dimensions of this phenomenon. The pandemic crisis highlights the relevance of the themes presented above regarding the value of uncertainty at all levels.

On the level of the state, the coronavirus pandemic required unprecedented state restrictions to protect public health. Anti-epidemic measures have had a significant impact on human freedoms and rights. Many countries could only handle the uncertainty of the pandemic through restrictions on freedom. In the context of the many victims and the uncertainty of further mutations of the virus, it is clear that these unprecedented measures were justified. However, governments of all countries faced difficult choices, as restrictions brought with them many other economic and social problems, as does any effort to eliminate uncertainty. The search for the optimal level of uncertainty is a task that humanity has faced since its inception, and the current era shows just how important this task is. As Joyce J. Fitzpatrick mentions pointing to the results of neurocognitive studies, we only learn from uncertainty: "if that is truly the case with humans then the learning occurring today with the uncertainty surrounding the COVID-19 pandemic positions

us for considerable intense and dramatic learning" (Fitzpatrick, 2020). It is precisely these difficult and uncertain pandemic conditions that can create the right backdrop for growth linked to learning and for realising our potential.

The uncertainty of the pandemic has dramatically affected entrepreneurs, especially those whose activities have been constrained by government measures. But even in this area, uncertainty opens space for learning and for harnessing creativity. Entrepreneurs confronted with uncertainty must look for new opportunities. Recent research on the impact of the COVID-19 pandemic on social enterprises, which represent a very vulnerable part of the market, particularly because they employ people disadvantaged in the labour market, shows that, despite numerous obstacles, many entrepreneurs have been able to seize the opportunities. In particular, these were the entrepreneurs operating in multiple business areas who were able to implement operational as well as strategic changes such as finding new customers, introducing new products or focusing on the production of respiratory masks (Kročil et al., 2021). However, it is clear that the level of uncertainty associated with the pandemic is too excessive and that the full impact of the current crisis will not be assessed until much later.

The COVID-19 pandemic is undoubtedly having an impact on employment, and for many people the uncertainty may be very oppressive. However, even the current pandemic-related crisis can bring people the feeling of fulfilment from work and the discovery of meaningfulness (Müller, 2020). Even in the deepest crisis caused by the pandemic, managers can pause to reflect on the situation. The manager of a company that was deeply affected by the pandemic describes this situation in terms of her own interest in the phenomenological literature as an opportunity to discover self-awareness (Kročil et al., in press). It is the experience of existential uncertainty that often reminds us of the possibility of non-being that provides a means to achieve authentic experience (Müller & Vaseková, in press). Another significant change that the pandemic has brought about through the dynamic development of IT is the possibility to work from anywhere in the world. This is especially true for talent who can be hired to work on the other side of the world, increasing the mobility of talented workers who can take advantage of more opportunities (Haak-Saheem, 2020). Trends related to virtual work will continue, and the labour market will have to deal with this fact both in terms of supply and demand for labour (Halová & Müller, 2021).

Discussion and Conclusion

The article pointed out that the uncertainty associated with work, whether at the level of social structure, individual entrepreneurial activities, or employment, is a significant value if it does not take extreme forms. It is necessary to protect a certain degree of uncertainty because it is a condition for our freedom in a deterministic world. Uncertainty is our greatest enemy, but also the greatest ally we need in our lives. It often becomes a neglected value. In addition to work-related uncertainty, we can talk about other uncertainties in this context, but what is most important is

work which we devote most of our time to and in which many of us find opportunities for self-actualisation and meaning-making. In other words, we need to fill our lives with something. Even if life was not associated with freedom, there is still a sense of freedom, as Albert Camus (1942/1979) observes, and we can add that this feeling is associated with uncertainty without which the economic system and business cannot function (von Mises, 1920/1990). Perhaps uncertainty is a solution to the problem of the globalized middle class that has nowhere to go, as noted by social anthropologist Thomas Hylland Eriksen (2008). Uncertainty makes it possible to create and build something again and again. And the understanding of uncertainty and the changes of approaches to uncertainty dramatically transform society and individual relationships within society. Thus, all history seems to be teaching us how to live with uncertainty, how to conceptualize it appropriately, and how to optimize its impact. A world with extreme uncertainty and a world without uncertainty are not good places to live.

Both the analysis of socio-economic relations and historical experience show that if uncertainty is removed from society and a centrally planned economy is established, the freedom to choose an occupation and the incentive to work are thereby abolished. Uncertainty is also important for business as it forces entrepreneurs to create new opportunities and seek profit. Without uncertainty, in a centrally planned economy, there is no market or economy, there is no even business activity. Entrepreneurs must be confronted with uncertainty about their existence (related to the threat to their being) and manage activities in order to achieve the optimum level of uncertainty and risk. In the context of employment, uncertainty is also important, and as sociological research shows, some people prefer the uncertainty of employment over certainty. These preferences are shaped by both social and psychological determinants. It is important to stress that uncertainty is important for personal development and for the sense of freedom.

The present affected by the COVID-19 pandemic brings considerable uncertainty that will transform various social processes. Moreover, because of the hard-to-predict mutations and the uncertainty about the success of full-scale vaccination programmes, we cannot be certain about when the struggle against the pandemic will be over. This context shapes one of the greatest lessons in our lives, which directly affects our ability to cope with uncertainty. In this shattering of the preconceived meanings we have attached to our former places in the hierarchy of the world, we have an opportunity to reassert the importance of interpersonal relationships and the value of human life—in the name of common humanity and solidarity (Patočka, 1990/1999). It is important for society to be able to assess an acceptable level of uncertainty that allows for a gradual return of people to their workplaces, because, as Adrienne Eaton and Charles Heckscher (2021) remind us, the workplace is an important place for the organization of workers and a space for mutual solidarity. As humans, we need to engage in face-to-face interactions and mutually affirm our humanity. It is only through common dialogue that we are able to deal with the greatest challenges, as evidenced by examples from the past (see: Camus, 2002/2006).

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ARTICLE

Perceived Efficacy of Virtual Leadership in the Crisis of the COVID-19 Pandemic

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ABSTRACT
As a crisis response to the COVID-19 pandemic, many companies quickly established virtual leadership systems and enabled employees to continue their work from home. This cross-sectional research addresses virtual leadership efficacy assessed by the leaders and by their employees. The findings suggest that leaders evaluate themselves significantly better than their employees, and their leadership efficacy mainly depends on their previous experience of working from home and ability to use communication technologies. This research contributes to the understanding of the factors that have the biggest influence on the belief in leadership efficacy in the context of a rapidly evolving system of remote work.

KEYWORDS
COVID-19 pandemic, virtual leadership, leadership efficacy, work from home, communication technology

Introduction

On 11 March 2020, the World Health Organization (WHO Director-General's opening remarks, 2020) declared a pandemic due to the outbreak of the new coronavirus COVID-19. Many countries thus introduced strict measures to limit interpersonal contact and impose social distance for most of the population in order to control the infection. In Slovenia, based on Article 7 of the Infectious Diseases Act, the government declared an epidemic on March 12, 2020 (Ministry of Health, 2020) due to the growing number of coronavirus cases and took measures to close educational institutions, reduce public life and encourage people to work from home.

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As many people switched to working from home, work processes became more flexible. However, although the lockdown was generally received positively, as it helped curb the spread of the pandemic, it also meant inequality among employees. Broadly speaking, more educated and skilled employees could continue their work from home, while those who could not do so were forced to claim income support. Moreover, while working from home was possible for people employed in education or finance or working for large corporations, and so on, those employed as truck drivers, as sales staff in grocery shops, or as production workers continued to go to work as usual to ensure the supply of essential goods. Finally, many workers simply lost their jobs and became dependent on state aid. As this was a health crisis, the order to work from home did not apply to healthcare professionals and other healthcare employees.

In this empirical cross-sectional research, we focused on leaders of those organizations that were able to adapt to the lockdown and allowed their staff to work from home. As all educational institutions were also closed, the work of some employees became very difficult to manage since they had to share time and space with their children, which could result in extra stress and disruptions.

Crisis situations threaten the viability of companies, generating feelings of doubt and uncertainty among the staff. In such a situation, everyone expects guidance from the management and leaders (Rosenthal et al., 2001). Much of the research dealing with crises focuses precisely on the responses of leaders (Boin & Hart, 2003; Halverson et al., 2004).

Research on virtual work has intensified since 1990, when virtual communication options such as email, video and/or audio conferencing, and other forms of internet-enabled communication gained popularity. There are several definitions of virtual work and virtual teams. An earlier study (Cohen & Gibson, 2003) summarized the definitions of virtual teams according to three characteristics. First, virtual teams are functional workgroups, that is, groups of individuals who are interdependent and working towards achieving a common goal. Second, the individuals who make up a virtual team are in some ways dispersed. Third, instead of personal, face-to-face business contacts that take place in traditional work environments, members of such teams mostly rely on computer technology to connect and communicate with each other.

Virtual leadership is one of the most important challenges in virtual teamwork, even under normal circumstances. The lack of personal contact with employees in different locations can cause difficulties in monitoring the performance of work tasks, coordinating the working group, establishing and maintaining trust, and resolving conflicts. Researchers agree that virtual leadership is more challenging than traditional leadership due to the lack of personal contact (Bell & Kozlowski, 2002; Cohen & Gibson, 2003; Hoch & Kozlowski, 2014). Leadership effectiveness plays a central role in the performance of a virtual team (Bell & Kozlowski, 2002; Morgeson et al., 2010; Zigurs, 2003), and the studies of virtual leadership mostly focus on two areas: the behaviours and personality traits of the leaders (Gilson et al., 2015).

Virtual leadership is usually related to the organizational structure of the related organization, which enables such work and is normally introduced in a structured and planned manner, together with changed work processes and the organizational

climate that supports such a way of working. Leadership encompasses many definitions and includes different leadership styles. In this research, we understand leadership in a broad sense, with a leader as a person who guides a group of people or an organization to achieve common goals.

In response to the pandemic, the remote work mode was quickly introduced in many organizations. This change in the mode of work due to the pandemic has not been studied explicitly in the literature so we sought to answer the following research question: do digital communication skills affect the perception of leadership efficacy when remote work modes were introduced during the COVID-19 crisis?

To answer this research question, we empirically examined the perception of leadership efficacy from the perspective of leaders and employees in connection with their digital communication skills and previous experience of working from home. In the next section *Theory and Hypotheses*, we review the existing literature and develop the hypotheses guiding this research. In the section *Research Methodology,* we describe the methods and present the data analysis. The results are discussed in section *Results*. Finally, in section *Discussion,* we assess the contribution of this study to the existing research field and consider its implications for management scholars and practitioners.

Theory and Hypotheses

Albert Bandura (1986) showed that the concept of self-efficacy, defined as an individual's belief in one's ability, can be a powerful predictor of an individual's performance. Empirical research has investigated the links between how self-efficacy predicts and affects performance (Haase et al., 2018; Miao et al., 2017). However, according to social cognitive theory, we understand an individual's action as a triad of reciprocal relations between cognition, behaviour and the immediate, current situation.

The concept of efficiency has recently been expanded to include the concept of "collective efficacy", which would not only derive from the self-related perception about one's own ability but would be part of the whole (social) system, which includes also an external source of efficacy (Bandura, 1997; Gibson & Earley, 2007). An additional external source of efficacy is the perception of efficacy, which is defined as an individual's perception of the usefulness of external resources that can affect their success (e.g., tools, technologies, etc.) and is complementary to self-efficacy in performance predictions (Eden et al., 2010; Eden & Sulimani, 2013; Walumbwa et al., 2008; Yaakobi, 2018).

Since most empirical research has focused on self-efficacy, we have introduced both concepts into our work. On the one hand, we examined the aspect of leadership self-efficacy as a self-perception and compared it with the aspect of leadership effectiveness based on the employees' perceptions. We proceeded from the definition that perceptions of collective efficacy and the effectiveness of another individual represent an external perception of effectiveness that affects an individual's perception in the available human and other resources that are important

to a performance of individual whose performance is assessed (Eden et al., 2010). We assumed that the models of self-perception and perception are related as stated in the following hypothesis (Hypothesis 1):

Hypothesis 1: According to the average scores on the items, there is a positive relationship between a leader's self-perception (self-efficacy) and an employee's perception of their immediate superior (efficacy).

Leaders, as key individuals in groups or organizations, are described as highly committed individuals, determined, goal-oriented, and capable of effective, practical, and rapid problem-solving (Yukl, 2016). As studies show, the individuals in leadership roles usually have a high sense of self-efficacy and put a lot of effort into meeting leadership expectations and persevering in the face of problems (Bandura, 1997; McCormick et al., 2002; Yukl, 2016). Based on these findings, we propose the following hypothesis (Hypothesis 2):

Hypothesis 2: Average assessments of leadership efficacy are higher when assessed by leaders (self-efficacy) than when assessed by employees.

Because many companies operate globally, they have introduced virtual work to harness the talents of employees regardless of location, enabling more innovative, efficient, and financially advantageous operations (Bell & Kozlowski, 2002; Hertel et al., 2005). In addition to the benefits, there are also challenges involved in virtual work. Hertel et al. (2005) describe individual challenges such as social isolation, misunderstandings, limited social contacts, and unclear roles and responsibilities. It is generally accepted that regardless of where work is performed—at the same location or remotely, the role of the leader requires similar skills (Davis & Bryant, 2003; Kayworth & Leidner, 2002; Zigurs, 2003). However, reduced interpersonal contact and asynchronous communication are the main challenges of virtual leadership, as leadership is highly dependent on the quality of the leader-employee interaction (Malhotra et al., 2007). The massive and rapid shift to remote work modes during the pandemic contributed to our interest in whether the previous experience of working from home had a positive effect on leadership efficacy, assessed by leaders and employees. Therefore, we propose the following hypotheses (Hypothesis 3a and 3b):

Hypothesis 3a: Previous experience of remote work has a positive effect on leaders' self-perception of their efficacy.

Hypothesis 3b: Previous experience of remote work has a positive effect on employees' perception of leadership efficacy.

Over the last 20 years, virtual work has become widespread due to the development of electronic communication technologies. For leaders, their ability to create a positive organizational environment that fosters strong collaboration has become vital. In addition to the social skills, they now need to master a variety of digital communication tools and be able to adapt digital communication to the receivers' expectations and preferences (Roman et.al., 2018). To test whether digital communication skills have a positive effect on leadership efficacy, we propose Hypothesis 4:

Hypothesis 4: Digital communication skills have a positive effect on the perception of virtual leadership efficacy.

Research Methodology

Data Collection and Sample

We performed a cross-sectional study. Data were collected from April 12 to May 2, 2020 using the services for online surveys 1KA[1]. The questionnaire was divided into two sets of items. The first set was completed by leaders who assessed their leadership self-efficacy. The second set was completed by employees who evaluated the leadership efficacy of their immediate superiors. An invitation to take part in the study was sent to 2,120 potential participants (1,050 leaders and 1,070 employees) via several platforms facilitating convenience and snowball sampling methods. In total, 908 respondents completed the survey, of which 382 (42.1%) were leaders who assessed themselves and 526 (57.9%) employees who evaluated their immediate superiors.

The group of leaders was composed of 223 males (58.4%) and 159 females (41.6%). As for their current jobs, 52.7% were employed in Slovenian private sector companies; 5.6%, in the public sector; 41.7%, in foreign private sector companies. A total of 278 (72.8%) leaders at the time of the COVID-19 pandemic reported working from home. Of those working from home, 48.6% reported no previous experience of virtual leadership. As for the type of organization, the lack of previous experience of virtual leadership was the highest (76.9%) in the public sector, followed by 55.4% in Slovenian companies and 44.5% in foreign companies. Finally, 69.5% of the male leaders and 47.2% of the female leaders assessed their digital communication skills with scores of 9 or 10, on a scale from 0 to 10 (with 0 meaning "communication technologies are a big challenge", so they mostly use phone calls, and 10, that they are well acquainted with the communication technologies and take full advantage of them).

The group of employees who evaluated their immediate superiors was composed of 324 males (61.6%) and 202 females (38.4%). This group evaluated their immediate superiors, composed of 372 male leaders (70.7%) and 154 female leaders (29.3%). As for their current jobs, 44.2% were employed in Slovenian private sector companies, 12.8% in the public sector, 43.0% in foreign private sector companies. A total of 378 (71.9%) employees at the time of the COVID-19 pandemic reported working from home. Of those working from home, 34.4% reported no previous experience of remote work. As for the type of organization, the lack of previous experience of working from home was the highest (56.8%) in the public sector, followed by 32.2% in Slovenian companies and 30.0% in foreign companies. Finally, 55.6% of the male leaders and 41.7% of the female leaders were assessed by their employees with scores of 9 or 10 on a scale from 0 to 10 (with 0 meaning "communication technologies are a big challenge for my boss, so they mostly use phone calls", and 10, that the leaders are well acquainted with communication technologies and take full advantage of them).

[1] https://www.1ka.si/

Measures

In this study, we used the Leadership Self-Efficiency Scale (LSE), developed by Andrea Bobbio and Anna Maria Manganelli (2009), as a multidimensional scale for the self-assessment of leaders. To better suit the measurement object, we have adjusted the scale to the Leadership Efficiency Scale (LE), which was used by the employees to assess their immediate superiors. The instrument has not yet been translated and adapted for the Slovene cultural and linguistic environment, so for this research we translated the questionnaire from English into Slovene. All items are shown in Appendix 1.

We used this questionnaire to ask the respondents who were in the role of leaders to self-evaluate their leadership efficacy and those who were in the role of employees to evaluate the leadership efficacy of their immediate superiors.

The LSE scale includes 21 items grouped into six first-order scales, highly correlated but conceptually distinct (introducing and leading the change process, selecting effective employees, building and managing interpersonal relationships, self-awareness and self-confidence, motivating employees, reaching consensus within the team). The response scale ranged from 1 = "I do not agree at all" to 5 = "I completely agree". The reliability of the original scales computed with ρ coefficients (Bagozzi, 1994) ranges from 0.65 to 0.79.

The LE scale was derived from the LSE scale. All questions are semantically the same, but instead of self-perceived efficacy for LE we ask about the leadership efficacy perceived by the employee. It is thus basically the same instrument, where only the object of measurement (myself/another) differs.

Data analysis

The data were processed using the statistical software package IBM SPSS Statistics 25, R programming language and environment (R Core Team, 2019) and Microsoft Excel. All statistical tests were performed at the significance level $\alpha = .05$. The factor structure of the LSE and LE scales was checked by confirmatory factor analysis using the lavaan package for R (Rosseel, 2012). In our case, we wanted to determine whether the empirical data fitted the LSE theoretical model, as assumed by Bobbio and Manganelli (Bobbio & Manganelli, 2009), with the assumption of six latent, mutually correlated factors with a second-order factor.

Goodness-of-fit was checked by using several indices simultaneously (Bollen, 1989). A combination of different fit indices is generally used to determine the suitability of a model. The following indices and criteria were selected to determine the suitability of the models: χ^2, the ratio between χ^2 and degree of freedom (χ^2/df), RMSEA (Root Mean Square Error of Approximation), SRMR (Standardized Root Mean Square Residual), and CFI (Comparative Fit Index). Non-significant χ^2, $\chi^2/df < 3$, RMSEA < 0.06, SRMR < 0.08 and CFI > 0.95 were considered as critical values of indices indicating the adequacy of the model (Hu & Bentler, 1999; Schumaker & Lomax, 1996).

Results

Confirmatory factor analysis

To verify the goodness-of-fit of the six-factor model to the expected structure of the LSE and LE scales, we performed a confirmatory factor analysis. According to the recommendations in the literature, we chose a combination of different fit indices, which are shown in Table 1.

Table 1

Evaluation of the General Fit Indices for the Models

Model	χ^2	χ^2/df	CFI	SRMR	RMSEA
LSE Scale	256.40	1.47	0.95	0.05	0.04
LE Scale	370.77	2.13	0.97	0.04	0.05

Note. LSE = Leadership Self-Efficacy (assessed by leaders), LE = Leadership Efficacy (assessed by employees).

Kenneth A. Bollen (1989) recommends citing more indices of the goodness-of-fit to the assumed model compared to the null model. The value of χ^2 was statistically significant for both LSE and LE ($p < .001$), indicating that the two models do not perfectly fit in the population. The value of relative χ^2 (χ^2/df) was considered when assessing the general suitability of the model. In our case, the value of χ^2/df was less than 3, which means an acceptable model fit (Schumaker & Lomax, 1996). Encouraging findings were also provided by the CFI indices (0.95 and 0.97), which likewise indicate a good fit of the model. An RMSEA value below or equal to 0.05 means a good fit to the model. In our measurement model, the RMSEA was 0.04 for LSE and 0.05 for LE, which means a good or appropriate fit of our data to the model. The SRMR values were 0.04 and 0.05, which also shows a good fit of the model.

Table 2 summarizes the relationships between the observed and latent variables. Standardized coefficients ranged from |.34| to |.69| for LSE and from |.54| to |.89| for LE, and all the items loaded significantly on their own factor ($p < .001$). Based on this, we can confirm the hypothesized latent structure.

Correlations among the six latent variables are shown in Table 3.

High correlation coefficients ($r > .90$) between dimensions 2 and 4, dimensions 4 and 5, and dimensions 5 and 6, led us to evaluate whether they were distinct by comparing the six-factor model (baseline) to nested models with fewer factors. In the first alternative representation (A1) we fixed the correlation between factors 2 and 4 to one, and we constrained these two factors to have equal correlations with all the other factors. In the second representation (A2) the correlation between factors 4 and 5 was fixed to one, and in the third representation (A3) the correlation between factors 4 and 5 was fixed to one, and the correlations with all the other factors were constrained to be equal. We looked at the validity of alternative models with respect to χ^2, χ^2/df and AIC. A significant χ^2, χ^2/df along with lower AIC indicate better models (Schumaker & Lomax, 1996). The results are summarized in Table 4.

Given that the baseline six-factor model proved to be better than the three alternative models (with the lowest values on all indices), we did not reject it despite the high intercorrelations.

Table 2
Values of Standardized Parameters of the Measurement Models

Latent variables	Items	Standardized loadings		R^2	
		LSE	***LE***	***LSE***	***LE***
Starting and leading change processes in groups	y_1	0.66	0.87	0.44	0.76
	y_2	0.63	0.80	0.40	0.65
	y_3	0.61	0.80	0.38	0.64
	y_4	0.53	0.78	0.28	0.61
Choosing effective employees and delegating responsibilities	y_5	0.63	0.87	0.40	0.75
	y_6	0.67	0.87	0.45	0.75
	y_7	0.68	0.80	0.46	0.64
Building and managing interpersonal relationships within the group	y_8	0.63	0.86	0.39	0.74
	y_9	0.34	0.54	0.12	0.30
	y_{10}	0.69	0.89	0.47	0.80
	y_{11}	0.52	0.71	0.27	0.50
Showing self-awareness and self-confidence	y_{12}	0.40	0.73	0.16	0.53
	y_{13}	0.57	0.76	0.33	0.58
	y_{14}	0.61	0.84	0.37	0.70
	y_{15}	0.56	0.76	0.31	0.58
Motivating people	y_{16}	0.57	0.87	0.33	0.75
	y_{17}	0.67	0.88	0.45	0.78
	y_{18}	0.63	0.87	0.40	0.76
	y_{19}	0.58	0.88	0.34	0.77
Gaining consensus of group members	y_{20}	0.68	0.79	0.46	0.63
	y_{21}	0.47	0.78	0.22	0.62

Note. LSE = Leadership Self-Efficacy (assessed by leaders), LE = Leadership Efficacy (assessed by employees).

Table 3
Correlations between LSE (N = 382) and LE (N = 526) Dimensions

	1	2	3	4	5	6
Starting and leading change processes in groups		0.88*	0.80*	0.90*	0.90*	0.86*
Choosing effective employees and delegating responsibilities	0.65*		0.82*	0.93*	0.89*	0.85*
Building and managing interpersonal relationships within the group	0.50*	0.68*		0.85*	0.88*	0.92*
Showing self-awareness and self-confidence	0.73*	0.75*	0.75*		0,94*	0,93*
Motivating people	0.71*	0.75*	0.83*	0.86*		0,94*
Gaining consensus of group members	0.65*	0.72*	0.88*	0.76*	0.86*	

Note. LSE coefficients below the diagonal and LE coefficients above the diagonal. *$p < .001$

Finally, the data-fit of the second-order factor loadings was checked, and the results were satisfactory, as summarized in Table 5.

All the *γ* coefficients were significant. See Figure 1.

Table 4

Comparative Fit Indices and Chi-Square Test for Model Comparison

Model	χ^2	Df	χ^2/df	p <	AIC
Baseline six-factor model	370.77	174	2.13	0.001	23559.59
Alternative model (A1)	565.73	178	3.18	0.001	23618.33
Alternative model (A2)	526.52	178	2.96	0.001	23579.00
Alternative model (A3)	528.02	178	3.18	0.001	23580.60

Table 5

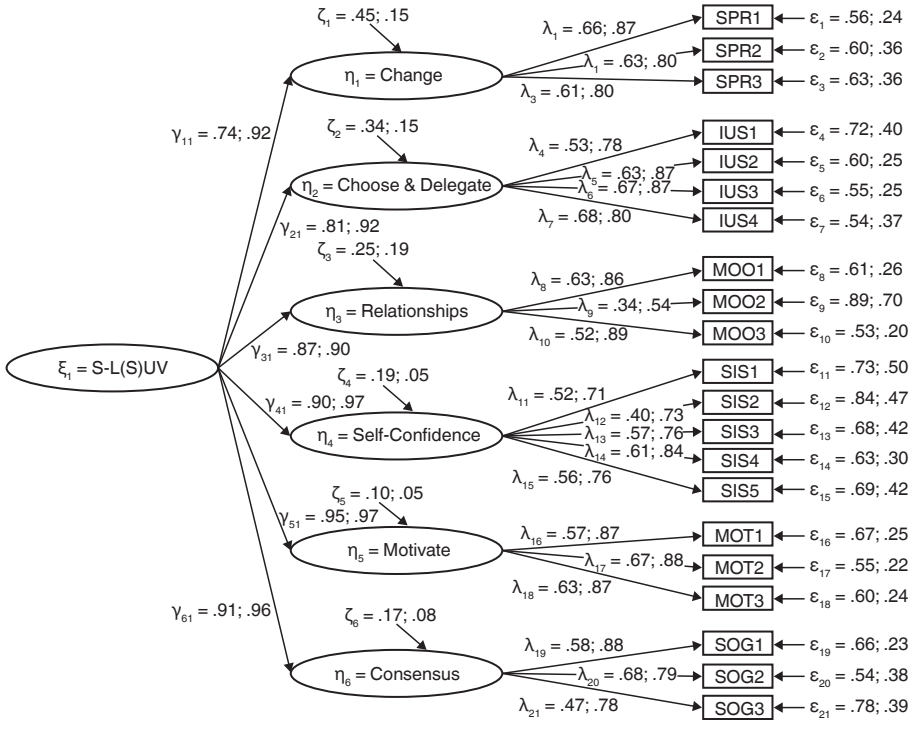
Evaluation of the General Fit Indices for the Second-Order Model

Model	χ^2	χ^2/df	CFI	SRMR	RMSEA
LSE scale	273.36	1.49	0.94	0.05	0.04
LE scale	418.98	2.29	0.97	0.06	0.04

Note. LSE = Leadership Self-Efficacy (assessed by leaders), LE = Leadership Efficacy (assessed by employees).

Figure 1

General Model of the LSE and LE Scales



Note. The first coefficient concerns LSE, the second concerns LE.

The reliability of the scales proved to be adequate (α for the Leadership Self-Efficiency Scale is 0.88 and for the Leadership Efficiency Scale is 0.96). The study also confirmed the simultaneous validity of both questionnaires and the positive correlation ($r = .726$, $p < .001$) between them.

Test of hypothesis

We assumed that there is a statistically significant relationship between the average scores on the items between the self-perception (self-efficacy) and employee perception (efficacy) models. The calculated positive correlation coefficient ($r = .726$, $p < .001$) indicates a statistically significant relationship between the models of self-perceived (LSE) and perceived (LE) leadership efficacy, which supports Hypothesis 1.

In addition, we were interested in whether the average assessments of leadership efficacy on all six factors and the overall assessment of the whole scale (21 items) differ between the self-perception of the leaders and the perceptions of their employees. The difference was statistically significant ($p < .001$) on all six dimensions as well as overall. The Cohen's *d* for estimating the overall effect size of the differences between the dimensions on the scales was 0.67, as shown in Table 6. Therefore, Hypothesis 2 was also supported.

Table 6

The Mean Score Differences between Leadership Self-Efficacy (LSE) and Efficacy (LE) on Six Dimensions of the Scale

		LSE		LE		*p* <	Cohen's *d*
		M	SD	M	SD		
Starting and leading change processes in groups	M	4.13	0.51	3.78	0.87		0.45
	F	4.10	0.47	3.57	0.96		0.66
	Total	**4.12**	**0.49**	**3.72**	**0.90**	**0.001**	**0.51**
Choosing effective employees and delegating responsibilities	M	4.20	0.41	3.72	0.87		0.63
	F	4.26	0.46	3.53	0.97		0.88
	Total	**4.23**	**0.43**	**3.66**	**0.90**	**0.001**	**0.71**
Building and managing interpersonal relationships within the group	M	4.19	0.48	3.75	0.92		0.55
	F	4.25	0.51	3.46	0.95		0.92
	Total	**4.22**	**0.49**	**3.66**	**0.94**	**0.002**	**0.67**
Showing self-awareness and self-confidence	M	4.21	0.43	3.85	0.79		0.51
	F	4.27	0.38	3.63	0.90		0.85
	Total	**4.24**	**0.41**	**3.79**	**0.83**	0.001	0.62
Motivating people	M	4.14	0.53	3.70	0.98		0.52
	F	4.25	0.48	3.41	1.09		0.90
	Total	4.19	0.51	3.61	1.02	0.001	0.65
Gaining consensus of group members	M	3.88	0.50	3.66	0.89		0.29
	F	3.97	0.52	3.48	0.94		0.61
	Total	**3.92**	**0.51**	**3.61**	**0.91**	**0.001**	**0.40**
General Leadership Efficacy Score	M	4.14	0.36	3.75	0.79		0.57
	F	4.20	0.35	3.53	0.89		0.89
	Total	**4.16**	**0.35**	**3.69**	**0.82**	**0.001**	**0.67**

Note. LSE = Leadership Self-Efficacy (assessed by leaders), LE = Leadership Efficacy (assessed by employees).

In addition, we assumed that the leaders who had previous experience of working from home would score higher on the leadership efficacy scale. With regard to LSE, the assessment of self-perceived leadership efficacy compared between the group of leaders with previous experience with the group without such experience differed statistically only in the scale of introduction and management of change (p = .03, Cohen's d = 0.3), where self-perceived efficiency was higher for those leaders who had previous experience. With regard to LE, previous experience of working from home had significant effects on perceived leadership efficacy (p < .05) on all scales, except for that of choosing effective employees and delegating responsibilities. Based on the results, Hypothesis 3a was not supported while Hypothesis 3b was supported (Table 7).

Table 7

Results of Hypotheses Testing

Dimension on LSE/LE Scale	3a	3b	4
Starting and leading change processes in groups	0.003 (0.27)*	0.006 (0.31)*	< 0.001 (0.61)*
Choosing effective employees and delegating responsibilities	0.246	0.207	< 0.001 (0.65)*
Building and managing interpersonal relationships within the group	0.177	0.001 (0.34)*	< 0.001 (0.63)*
Showing self-awareness and self-confidence	0.064	0.046 (0.26)*	< 0.001 (0.58)*
Motivating people	0.941	0.005 (0.30)*	< 0.001 (0.73)*
Gaining consensus of group members	0.638	0.002 (0.30)*	< 0.001 (0.65)*
General Leadership Efficacy Score	0.101	0.007 (0.30)*	< 0.001 (0.70)*

Note. Numbers above the brackets are p-values; the number in the bracket is Cohen's d value. *p < .05.

Given that leadership is related to communication skills (Eisenberg et al., 2019), we concluded that experience with digital communication technologies has a positive effect on leadership efficacy. We compared the group of leaders whose communication technology skills were rated by their employees as excellent (scores 9 and 10) with the group of leaders whose skills were assessed as poorer (scores ≤ 6). In Table 7, we see that the leadership efficacy scores were statistically significantly higher in those leaders whose digital communication skills were assessed as excellent (p < 0.001, d = 0.7). Therefore, Hypothesis 4 was supported.

Discussion

The purpose of the research was to examine virtual leadership in times of crisis when the COVID-19 pandemic was declared in Slovenia. For this reason, we used the model of leadership self-efficacy to examine the self-perceived leadership in relation to different groups of leaders. As we also wanted to study the perception of leadership efficacy by employees, we adapted the model into a model of leadership efficacy.

This research was based on social cognitive theory and used the concept of efficacy from the point of view of both self-perception (self-efficacy) and that of the

environment (efficacy). The concept of self-efficacy originates from individuals' belief in their own effectiveness and is an important motivational construct. It influences an individual's decisions, goals, and emotional reactions, and the effort that they invest in a focal activity. Given that in addition to internal influences there are also external ones that contribute to an individual's belief that they can function successfully, we have added the concept of efficacy to the concept of self-efficacy. Thus, we wanted to find out the external belief in the efficacy of leadership, which then indirectly affects the individual's belief in the external human resources important for success in the workplace. These external human resources are, in our case, the skills of a leader that contribute to successful team guidance, motivation, and consensus among employees.

The main findings of the research relate to the differences between self-perceived and perceived leadership efficacy between different groups of leaders. Based on the results, we can conclude that the self-perception of leaders in all six dimensions (starting and leading change processes in groups, choosing effective employees and delegating responsibilities, building and managing interpersonal relationships within the group, showing self-awareness and self-confidence, motivating people and gaining consensus of group members) is statistically significantly higher than it is perceived by employees. Experience is needed for virtual leadership, as our results showed that leaders who had previous experience of working from home were perceived as more effective. The efficacy of virtual leadership is also influenced by communication digital skills, which was also shown by our research.

This study was a response to the COVID-19 crisis and the general shift to working from home, and therefore the implementation of virtual leadership as a reaction to the pandemic. Our study focuses on the context of the crisis and attempts to contribute to a better understanding of leadership efficacy in a virtual setting, as we anticipate that working from home will become more common and organizations will gradually introduce it even under normal circumstances. Thus, the current study contributes to the critical body of research demonstrating how virtual leadership experience and communication technology skills influence the way leaders are perceived by themselves and their employees.

Moreover, the findings associated with our research have practical implications. First, as we have seen from the results, in addition to the general leadership skills, in the time of crisis, if one has previous experience of working from home, it makes them perceive themselves as more efficient. In practice, this can mean that leaders with previous experience of virtual work are less prone to micromanagement and feel less anxious about not being able to see their employees work and monitor their work progress. Minimizing the gap of perception between the leaders and their employees is the key to preventing remote workplace harassment, i.e., excessive behaviour management by leaders, such as reprimanding and instructing employees in front of a large group of people during online meetings and issuing work-related instructions via chat or video phone after working hours. Therefore, it is important to discuss and decide in advance how to report one's progress to the manager when working remotely. Second, virtual leaders must develop excellent communication technology skills.

Chat functions should be utilized to create a work environment in which employees can consult their leaders anytime. Third, leaders need to pay more attention to their self-perceived leadership efficacy and have some scepticism about it, as it is significantly higher than the leadership efficacy that is perceived by their employees. In this new form of work, leaders should put greater effort into setting up some rules in advance for areas that require care when working remotely. This will put both leaders and their employees at ease and make it easier for leaders to manage and for their employees to work comfortably.

Although the sample in the study was appropriately large and we were able to confirm most of the hypotheses, one of the main shortcomings of the sample was the selection of participants. The survey covered the general population of employees, regardless of their affiliation to an organization. Since the organizational cultures of individual companies differ from each other, it would be better to conduct a survey of leadership efficacy within individual organizations. The use of self-assessment questionnaires in this study is also worth mentioning, at least in the case of leaders. Since the respondents could give answers based on various cognitive biases and might also have been inclined to give socially desirable answers (Moorman & Podsakoff, 1992), it should thus be noted that the results are likely to be subject to certain biases or errors associated with this method (Spector, 2006).

Linking self-perception of leadership efficacy and the perceptions of the employees is one of the possible starting points for the analysis of leadership effectiveness, as it allows us to understand the factors that indirectly affect performance. A large divergence in leaders' and employees' leadership efficacy assessments in measuring different latent variables could be an indicator of the interventions necessary in terms of developing better leadership skills. However, testing this assumption would require empirical studies in the context of a larger organization.

Despite these limitations, our findings reveal that leaders with previous experience of working from home and better digital communication skills are perceived as more effective by both themselves and their employees. Therefore, appropriate preparation, support, education and guidance for such individuals (i.e., mentoring, coaching, consulting) with regard to leadership, communication, motivation, and stress management, are crucial for their successful work online and at home.

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ARTICLE

Cartoon Image of the Mother, Its Perception by Elementary School Students and Correction in the Process of Media Education

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ABSTRACT

This article presents a psychological study of the mother image projected in cartoons and its perception by elementary school students. The research provides evidence for the importance of an integral approach to the analysis of media texts addressed to children, as well as for the necessity of considering their narrative, verbal, and descriptive components. A psychological analysis was conducted on the material of three cartoons: “Chunya” (USSR), “Barboskiny” [The Barkers] (Russia), and “Peppa Pig” (UK). Hypotheses were formulated about the potential influence of the cartoons on the younger audience. 70 elementary school students (χ = 9.5 years old) took part in the study. The research was conducted using the method of semantic differential; the data obtained were processed using factor analysis. The results show that the categorization of images follows the factors of “education”, “love”, “patience”, and “respect”. Differences in the semantic assessment of the cartoons under study are presented. Children perceive the events taking place in a cartoon directly, without reflection. Artistic mediation—polysemy, metaphors, and the category of the comic—does not evoke an aesthetic reaction in children, as assumed by the authors. It was found that the semantic assessment of the word “mother” by elementary school students did not agree

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with the traditional cultural status of a mother. Thus, the respondents ranked such indicators as “understanding” and “prestige” at a low level. A developmental experiment was conducted to correct the mother image as perceived by elementary school students. During the experimental program (8 lessons in total), the schoolchildren watched and discussed the cartoons together with a psychologist. At the end of the experiment, the semantic assessment of the verbal stimulus “mom” by the respondents showed a statistically significantly increase ($p \leq 0.05$) in the indicators of “understanding” and “prestige”.

KEYWORDS
cartoon, mother image, elementary school students, psychological analysis, narrative, semantic assessment, harmonic center

Introduction

Media communications today penetrate all areas of human life. Children are involuntary but active consumers of media content. Since the modern living space is filled with various media forms, children are forced to listen and watch commercials, news programs, talk shows, and other information addressed to adults. In addition, children make up the target audience of children’s content—first of all, cartoons, which they start watching from a very young age.

The increasing involvement of a modern child in media consumption makes the research into the psychological effects of media products on children highly important. Effective algorithms for the psychological analysis of media content should be developed to investigate the role of media content in the formation of a child’s personality and their attitude toward significant others. Thus, the image of the mother (as the most significant other) projected through cartoons should become the subject of psychological analysis. Today, the attitude toward the mother, which will further determine all aspects of a person’s mental life, is formed not only via direct mother-child communication, but is also mediated by media narratives. This fact determined the aim of our research: to conduct a psychological analysis of cartoons displaying different images of the mother in order to theoretically substantiate and empirically test their influence on the perception of the mother by younger schoolchildren.

Research into the impact of television media products on consumers is becoming increasingly active. The results show that the possibilities of influencing children through cartoons are endless—they can provoke aggression, affect the intellectual and emotional spheres of their psyche (Luo & Kim, 2020). Researchers note both negative and positive psychological consequences of media communications.

When verifying the hypothesis that marginalization of certain groups of the population in children’s minds occurs due to the stereotypes broadcast in the media (Rovner-Lev & Elias, 2020), the authors revealed that the images of older people, especially women, are extremely negative: they are weird, mean, and socially devalued. It was concluded that such images prevent the formation of a respectful

attitude toward the elderly. Zurcher and Robinson also confirmed a growing number of negative stereotypes about older people (Zurcher & Robinson, 2018).

Children are the most vulnerable group of media content consumers. A film character might become a significant other for the child, thereby influencing their view of the world: "A digital image [...] fills the inner world and becomes a condition for perception, a censor of the acceptable and unacceptable"[1] (Savchuk, 2014, p. 205). This is a rationale for analyzing the negative impact of cartoons with characters implementing destructive patterns of behavior on the screen; on the other hand, that implies that "good" cartoons can be used for educational purposes (Attard & Cremona, 2021). Güneş et al. differentiated cartoons into useful, harmful, and neutral; children, who watch harmful films, can be characterized by emotional and behavioral problems, attention deficit and communication difficulties (Güneş et al., 2020).

The use cartoons for children's development and correction of their behavior is currently attracting much research attention. Thus, Zhang et al., when studying the possibility of reducing the aggressiveness of preschoolers by watching cartoons, showed that cartoons demonstrating models of prosocial behavior reduce the manifestations of aggression in children's behavior (Zhang et al., 2020).

Assuming that a character's behavior displayed in a cartoon is exemplary and motivating for children, Maria Esther del Moral Pérez and Nerea López-Bouzas assumed that cartoons with disabled characters are useful in forming a good attitude toward disabled people (del Moral Pérez & López-Bouzas, 2021). The power of cartoons consists in reducing not only anxiety, but also physical pain during phlebotomy (İnangil et al., 2020). Cartoons based on fairy tales are considered as a means for developing health-preserving competence in children with disabilities (Kazachiner & Tkachenko, 2020). In the same (educational) context, researchers propose using cartoons to form children's healthy eating habits (Hémar-Nikolas et al., 2021).

Although the impact of media communication on children's development is attracting wide research interest, the current literature lacks both effective algorithms for the psychological analysis of media products addressed to children and publications describing the mechanisms through which media narratives affect viewers. In addition, to the best of our knowledge, there are no correctional programs developed based on analytical work with media content. Our research aims to fill this gap.

We studied the correlation between a child's perception of the mother image depending on its presentation in different cartoons. Mother is the most important mediator in children's development. However, psychologists, when studying the dependence of a child's formation on the style of maternal communication, her age, attitude to pregnancy, and education, pay little attention to the appearance of a virtual, media-mediated image of the mother in a child's world. At the same time, researchers state that traditional cultural models of motherhood have changed due to the media. Jo Littler found that the mother image in modern films conveys unproductive behavior condemned in traditional society, including an endless entertainment and a chaotic

[1] Hereinafter, all the quotes in English are translated by the authors.

living style, which is more consistent with the behavioral model of adults with no children. The researcher believes that such a mutation of the mother image results from the neoliberal crisis, reflected in the value attitudes of the content producers (Littler, 2019).

Oksana V. Kazachenko and Elena A. Kartushina noted that modern cartoons frequently display fathers implementing maternal behavior, which indicates the value transformation of the traditional maternal image (Kazachenko & Kartushina, 2018). Based on an analysis of contemporary feature films, Tatyana L. Shishova distinguished a number of nontraditional and negative images of the mother: "mother as a hysterical woman", "foolish mother", "killer-mother", "debauchery mother" (Shishova, n.d.).

Vladimir Halilov also noted a trend toward transformation of the traditionally creative image of the mother in media products, evidencing destruction of the traditional family model in Hollywood media products. Using the cartoon "The Incredibles" as an example, he shows the transformation of family relations and the reorientation toward parental self-realization attitudes outside the family (Halilov, 2019).

The deep archetypal meaning of the mother image is revealed by Carl Jung, who sees it as part of the collective unconscious. According to him, these images are the "patterns of functioning", which result in a child's behavior (Jung, 1969, p. 87). The qualities associated with the mother archetype "are maternal solicitude and sympathy; the magic authority of the female; the wisdom and spiritual exaltation [...]; all that is benign, all that cherishes and sustains, that fosters growth and fertility" (Jung, 1969, p. 90). Maternal influence, according to Jung, is determined by her archetype, projected onto a real mother. At the same time, we believe that children's fantasies about the mother, which form their attitude and behavior, can be determined by the following assumption: these fantasies "may not always be rooted in the unconscious archetype but may have been occasioned by fairytales or accidental remarks" (Jung, 1969, p. 91). Such "remarks" undoubtedly include children's viewing experience and their encounters with the mother image on the screen.

In this study, we examine the impact of the cartoon image of the mother on elementary school students. At the same time, the subject of the study includes cartoons, in which the maternal function is performed by anthropomorphic animals. This selection is determined by the emotional influence of animals' images on children, which Lev S. Vygotsky explained by the ability of such images to create isolation from the reality, necessary for an aesthetical impression (Vygotsky, 1987, p. 122). Contemporary studies show that, when watching cartoons with anthropomorphic animals and objects, children assign human characteristics to them in the reality (Li et al., 2019). The cartoon images of animals are organic to children's perception of the world; a child perceives animals as carriers of typical cultural traits.

We hypothetically assume that the media presentation of the mother image determines its perception by elementary school students, and this perception is not reflective. We also believe that cartoons that display a positive maternal image, corresponding to archetypal semantics, can be used to correct the image of the mother in the minds of elementary school students.

During the research, the following objectives were formulated: (a) to develop an algorithm for psychological analysis of cartoons in order to determine their potential impact on children; (b) to carry out a psychological analysis of cartoons featuring mother images; (c) to analyze the specifics of perception of different cartoon mother images by younger schoolchildren; (d) to determine the correspondence between schoolchildren's semantic assessment of cartoon mother images and the hypothetically assumed psychological potential of the cartoons; (e) to conduct a developmental experiment aimed at correcting the mother image in the minds of younger schoolchildren.

Materials and Methods

Using the method of psychological analysis of media text (Kyshtymova, 2018), we formed hypotheses on the potential impact of cartoons on viewers. This allowed us to reveal the semantic (meaningful) and syntactic (formal) indices of a media product, which determine specific features of the medium world, into which the viewers get immersed. A psychological analysis of speech statements of cartoon characters was processed using the software tool TextAnalyzer.

The following cartoons containing the image of the mother were used as the evaluated stimuli: "Sama nevinnost' [Innocence itself]—episode 48 of "Barboskiny" [The Barkers][2] (Salabay et al, 2012); "Mummy Pig at Work"—episode 7 of "Peppa Pig" (Astley & Baker, 2004) and "Chunya" (Prytkov, 1968). All the cartoons are very popular: the number of views on their YouTube[3] channels for 2014–2021 was 6,991,683, 1,810,391 and 78,773, respectively. There are 3,970,000 subscribers to the Peppa channel in Russia.

The stimuli were evaluated using the method of semantic differential, which is composed of scales obtained using the method of free associations: "fond of children–not fond of children"; "credible–not credible"; "hardworking–lazy"; "honest–dishonest", "successful–unsuccessful", "full of energy–tired", "charming–attractive", "rich–poor", "prestigious–not prestigious", "friend–foe", "friendly–hostile", "kind–evil", "reliable–unreliable", "light–dark", "level-headed–unstable", "pleasant–unpleasant", "tolerant–intolerant", "understanding–not understanding", "cheerful–sad", "beloved–hated", "smart–stupid", "humble–vain", "strict–not strict", "just–unjust", "modern–old-fashioned", "educated–uneducated", "competent–incompetent", "experienced–inexperienced", "responsible–irresponsible", "sociable–unsociable", "tactful–tactless", "patient–impatient", "calm–irritable", "fashionable–unfashionable", "cheerful–sad", "warm–cold", "heartful–heartless", "contradictory–logical", "cultured–uncultured", "trusting–not trusting", "changing–consistent".

Using a developmental experiment, we aimed to correct the mother image in the minds of elementary school students and form their skills to understand and critically evaluate media content. The experimental program involved, in particular, analytical work with the cartoon "Umka" (Pekar and Popov, 1969), which contains a positive image of the mother. In total, there were eight sessions of 45 minutes each (Table 1).

[2] Also known as "Barboskins", a direct translation of the original Russian title "Barboskiny".

[3] YouTube™ is a trademark of Google Inc., registered in the U.S. and other countries.

Table 1
Lesson Content

Section 1. My family	
1.1. Introduction to the topic. My family	Conversation on the topic “My family”, students’ stories about their family; presentation of pictures about the family, discussion.
1.2. Mother is the first word [...]	Semantic evaluation of the word “mother”. Students’ stories about their mothers.
1.3. The mother’s image in cartoons.	Discussing with the students the images of the family and mother from the cartoons “The Barkers”, “Peppa Pig” and “Chunya”.
Section 2. Real mother	
2.1. “Mothers of all kinds are important”	Conversation about mother’s images in fiction
2.2. The real mother in cartoons	Watching the cartoon “Umka”, discussing the mother’s image presented in it, highlighting its main characteristics — creating a mother’s portrait.
Section 3. Media education	
3.1. I choose a cartoon.	Discussing the criteria for a “good” cartoon. The fundamentals of the psychological safety concept.
3.2. A useful cartoon!	Creating a cartoon (drawing) with a mother’s image in small groups and their presentation.
3.3. Cartoon and mother	Semantic evaluation of the word “mother”. Coming up with a general plot for a good cartoon.

The information obtained was processed using the methods of descriptive statistics, factor analysis, and Mann–Whitney–Wilcoxon nonparametric tests.

The study involved 70 elementary school students 9–10 years old (36 girls and 34 boys), who studied at Secondary School No. 21 in Irkutsk (Russia). All parents provided their consent to the study. To implement the experimental part of the research, the students were differentiated into two groups, 35 people each. Lessons were held in a classroom having special equipment for watching cartoons and drawing tools. The main form of interaction between a psychologist and schoolchildren was a polylogue. The experimental work was carried out in strict accordance with the ethical standards of the professional activity of a teacher-psychologist.

Results

Psychological Analysis of the Cartoons

The first stage of the study involved an immanent psychological analysis (Kyshtymova, 2018) of cartoons in order to form hypotheses about their potential impact on children.

The cartoon “Chunya” presents a story, the main idea of which is expressed by the words of the protagonist’s mother, addressed to him: “It doesn’t matter who you are, what matters is what you are!” Anti-stigmatization as the key idea of this cartoon, created in 1968, is especially relevant today, at the time of increasing economic, political, educational, etc. differentiation of all societies.

The plot is built according to a traditional fairytale model of travel: the protagonist leaves home and faces encounters, which test and manifest his

character. For example, Chunya helps a lost chicken and then a hare. He faces a situation of undeserved resentment associated with his "species" affinity to pigs—carriers of the stigma of untidiness. But the protagonist solves all the problems under the guidance of his wise mother.

The verbal means of presenting the ideological content of the cartoon correspond to the age characteristics of the target audience. An analysis conducted using TextAnalyzer showed that, out of 342 words uttered by the cartoon characters, only 98 are non-repetitive. Therefore, children's consciousness is not overloaded with verbal information; the lexical simplicity and laconicism of syntactic constructions allow children to adequately perceive the spoken word. The "harmonious center", which marks the semantic dominant of the text and is determined according to the law of the "golden section" (Kyshtymova, 2008), corresponds to the following statements: "Everything in the world, I'm going to learn about everything in the world"; and "I'm not scared, I'm not scared at all". Repetition and music reinforce the value of these positive statements.

Another formal sign—a tempo-rhythm—also corresponds to the specifics of information processing in terms of age: in 10 minutes of the cartoon's duration, 25 scenes follow each other, the events on the screen are logical, slow-paced and clear to children. The rhythmic clarity is supported by the melody: a simple and joyful musical intonation complements the visual images of the characters.

The cartoon characters are depicted similar to children's toys, which corresponds to children's perception. At the same time, the characters (anthropomorphous animals) are the carriers of the following features: faithfulness and kindness, generosity and naiveté, strictness and readiness to help. The semantic load of the mother image as a conduit of moral truth, which the mother transfers to her child with great care and love, constitutes the educational value of the cartoon.

The narrative centers around the protagonist leaving the space protected by his mother at home into the outside world, fraught with many surprises. This event entails important consequences for Chunya and, of course, the audience of the cartoon, the understanding of the truth of maternal attitudes, the importance of kindness and mutual assistance, acceptance of one's dissimilarity from others and making friends. It can be assumed that the film will be understood by children and will have a positive impact on their development.

The episode "Innocence itself" of "The Barkers" involves an everyday story about gifts, which the elder children demand from their mom with no success. After some illogical actions (a present for the youngest and the elder children's pretense act), the main characters receive their gifts, but considerably less valuable. There is no obvious educational idea in this cartoon.

Our analysis has shown that the temporythm is characterized by an increased dynamicity—in 5.6 minutes, 59 scenes follow, accompanied by color and sonic intensity. Such a way of presenting information "exceeds the conscious resources" (Pronina, 2003), which makes the official addressing of the cartoon "0+" (restriction "for children under 6 years" established by the legislation of the Russian Federation) illegitimate.

The verbal component of the cartoon is characterized by its richness: the total number of non-repeating independent words spoken in the cartoon is 139. Since a two-year-old child is considered to have a vocabulary of around 50 words, the official labeling of the film "0+" seems unreasonable. It is interesting that the place of the "harmonic center" of the text (which was calculated twice: from its beginning and from its end) corresponds to the statements of the Barkers' mother: "Not getting any new things until school is out", and "not [...] any new things". The viewer's attention is thus unconsciously fixed on a mirrored repeated statement, which (according to the narrative) is false.

The mother of the Barkers' exhibits inconsistent behavior. Refusing gifts to her children, she gives one for the youngest, which causes jealousy in the eldest and provokes them to cheating. In the end, she still buys presents to the rest of the children. The vagueness of the cause-and-effect relationships of the mother's behavior expressed in the cartoon complicates the viewers' understanding of the idea that deception is inadmissible. By punishing the children for cheating with the wrong gift they expected, the mother is cheating them herself.

The cartoon centers around an event of violation of the ethical border, which both the Barkers' children and their mother cross. The consequences of this intersection, which have special importance for the viewer, are not obvious in the represented narrative, and sympathy with the main characters is not positive for the development of younger viewers. The events of the cartoon require critical reflection, which children lack at their young age.

The episode "Mummy Pig at Work" ("Peppa Pig" cartoon series) presents an event of children interfering with the work of their mother, crossing her professional space. The consequences for the main characters are positive—everyone is happy. The emotional background of the presented events is emphatically positive in all stages of the on-screen actions, which causes "the contagious effect" and viewers adopting the transmitted models of behavior. This is also facilitated by the use of the "exceeding the conscious resources" technique, which violates the psychological safety of the viewer: 42 scenes follow each other in the 4.8 minutes of the cartoon's duration.

The images of the parents present a model of transformed traditional family roles: Daddy Pig prepares food and does not make decisions on his own, appealing to his wife's opinion, while Mom works and her decisions are not challenged. At the same time, the cartoon realizes an example of broken communication—the mother is the dominant figure, who does not listen to others. When asked to fix the computer, Dad hesitantly utters: "But I'm not very good at such things". Mom's answer is illogical: "Thank you, Daddy Pig". The violation of the logic is also manifested in the scene where Daddy Pig, who is not good at technology and accidentally presses the necessary button, joyfully states: "Yes, I am a bit of an expert at these things". It is important to understand that the category of the comic is not yet accessible to the understanding of children, the on-screen events are perceived as an example of the "correct" reality.

An analysis of the verbal component of the media text shows its lexical simplicity: out of 189 words, 145 are repeated. This makes the broadcast information

available to children. The "harmonic center" of the text contains the reference "Daddy Pig, can you mend the computer?" This phrase marks the episode with the transformation of the Father's role function, who, in this situation (a) cannot help; (b) cannot disobey Mom; (c) deceives her and himself by saying that he "mended it" and now is "an expert".

The visual presentation of the characters in the cartoon is characterized by convention and graphic disproportionality, which does not correspond to the age characteristics of the target audience. It is despite the fact that the background of the action, reminiscent of a child's drawing, leads children to trusting the on-screen events.

The conducted analysis suggests that the cartoon can have a strong emotional impact on children and provoke unproductive behavior. Its formal marking "0+" does not meet the criteria for the psychological safety of children.

Thus, our psychological analysis of the 3 media texts shows that only the cartoon "Chunya" is characterized by developmental potential, while "Innocence itself" and "Mummy Pig at Work", due to their formal and semantic features, can lead to negative mental changes in younger viewers.

Semantic Assessment of the Cartoons by Elementary School Students

70 elementary school students 9–10 years old (36 girls and 34 boys) took part in the study of perception of cartoon mother images. Having watched each of the 3 cartoons, the participants evaluated the mother image as projected in these episodes according to the scales of semantic differential. The data obtained were subjected to factor analysis using the method of principal components with Varimax rotation. The results generated 4 factors explaining 66.1% of the variable dispersion.

The 1st factor, referred to as the "factor of education", included the following scales: "educated–uneducated" (0.852), "responsible–irresponsible" (0.791), "competent–incompetent" (0.783), "experienced–inexperienced" (0.748), "cultured–uncultured" (0.706), "sociable–unsociable" (0.678). The 2nd "factor of love" constituted the scales "beloved–hated" (0.836), "cheerful–sad" (0.792), "fond of children–not fond of children" (0.751), "understanding–not understanding" (0.625). The 3rd "factor of patience" included the scales "calm–irritable" (0.929), "patient–impatient" (0.853), "tactful–tactless" (0.780). The 4th "factor of respect" involved the scales "prestigious–not prestigious" (0.771) and "friend–foe" (0.766). Thus, the cartoons were categorized by younger students on the semantic grounds of "education", "love", "patience", and "respect".

Our analysis showed that the research participants perceived the mother in "Chunya" as patient (F3 = 0.15) and showing respect for others (F4 = 0.11). At the same time, they saw her as "uneducated" (F1 = –0.07) and not loving enough (F2 = –0.01), compared to Mummy Pig from "Peppa Pig" (F1 = 0.04, F2 = 0.01) and Mom of the Barkers: F1 = 0.03, F2 = 0.01 (Fig. 1). Obviously, the children's assessment was mediated by the simplest "external" stereotypes: was being engaged in housework and wearing an apron, Chunya's mother was categorized as "uneducated", compared to Mummy Pig who "worked" on a computer. At the same time, more adequate criteria

for assessing education—literacy, reasoning of speech, and motivation of actions—were not used by children and did not affect their assessment due to the lack of critical thinking at their age.

The difference in the semantics of cartoon characters in terms of the "love" factor did not reach the level of statistical significance ($p > 0.05$), while all the values were small (Fig. 1). It can be assumed that the children's unconscious expectations were not satisfied. The media (virtual) image may generally have a weak potential for realizing the semantics of maternal love, or the artistic level of the media text addressed to children should be very high and take into account the peculiarities of children's perception.

The high semantic assessment of the image of Chunya's mother in terms of "patience" and "respect" shows that (a) younger schoolchildren understand adequately the meanings embedded in the cartoon "Chunya"; (b) the fictional world of this media text corresponds to the peculiarities of children's perception; and (c) this cartoon has a high educational potential.

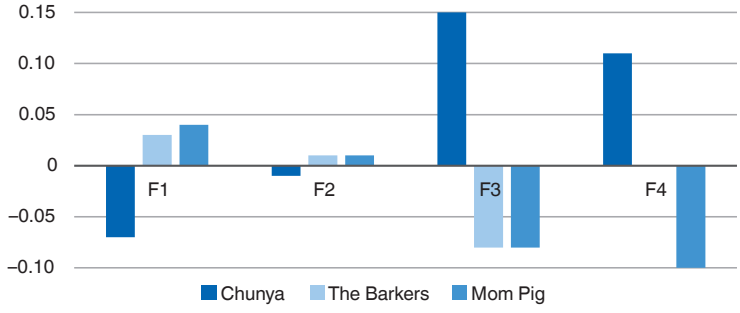
The low estimation of Mummy Pig in terms of "patience" and "respect", indicates, on the one hand, the digestibility of the information broadcast by the cartoon "Peppa Pig" for children (which was hypothetically assumed based on the psychological analysis of the media text) and, on the other, the potential negative impact of this cartoon on a child's personality due to the negative characteristics attributed to the mother.

The data obtained demonstrate that children perceive the events of the media world as real, with their response being mediated emotionally rather than cognitively. Metaphors, humor, and semantic ambiguity are not perceived by children and do not facilitate understanding.

The children's assessment of the verbal stimulus "mom" shows a smaller semantic differentiation. The conducted factor analysis revealed two factors—"understanding" and "prestige"—explaining 66.8% of the variable dispersion.

Figure 1

Semantic Assessment of the Mother Images in the Cartoons "Chunya", "Innocence itself" (The Barkers) and "Mummy Pig at Work" (Peppa Pig) by Elementary School Students in Terms of the"Education" (F1), "Love" (F2), "Patience" (F3), and "Respect" (F4) Factors



The "understanding" factor, with a high load, included the scales, one pole of which is represented by the following epithets: "patient", "understanding", "sociable", "just", "kind", "cheerful", "fond of children", "not strict", "tactful", "calm", "tolerant", "reliable", "beloved", "honest", "experienced", "modern", "smart", "hardworking", "humble", and "level-headed".

The "prestige" factor is represented by the words: "prestigious", "successful", "friendly", "full of energy", "rich", "responsible", "charming", and "competent".

Our analysis of the perception of the word "mom" by elementary school students revealed an unexpectedly low result: a negative value by the factor of "prestige" (F2 = –0.57) and a low value by the factor of "understanding" (F1 = 0.1). The obtained result can be considered reliable due to the validity of the diagnostic procedure; however, this finding contradicts the traditional belief about the value of the mother image for children. It seems likely that, at the elementary school age, the role of the significant other shifts from the mother to the teacher. This also evidences to an increasing role of media communications in the lives of both children and adults, leading to a decreased intensity of interpersonal communications and a shortage of maternal participation in the lives of children.

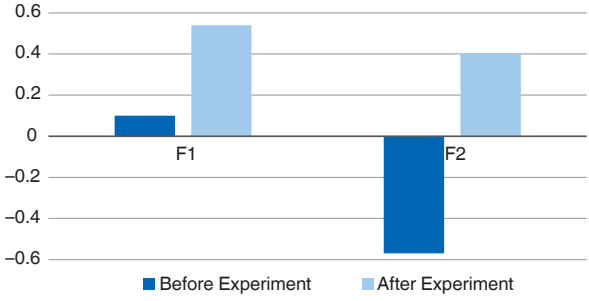
Results of the Experimental Study

On the basis of the data obtained in the semantic study of the stimulus "mother", we conducted a developmental experiment with the aim of correcting the mother image in the minds of elementary school students. We assumed that watching cartoons can have a positive effect provided that (a) it is accompanied by a joint critical discussion with a psychologist and (b) such viewing involves media texts that possess a developmental and educational potential.

Two groups of elementary school students (70 children in total) watched the cartoons under study and the cartoon "Umka" (Pekar & Popov, 1969) followed by their discussion with a psychologist. Having completed the developmental work, we conducted another round of semantic assessment. For both factors "understanding" and "prestige", the Wilcoxon test showed a statistically significant shift in values (p = 0.000): F1 = 0.54, F2 = 0.4 (Fig. 2).

Figure 2

Changes in the Semantic Assessment of the Mother Image by Younger Schoolchildren in Terms of the "Understanding" (F1) and "Prestige" (F2) Factors during the Experiment



Our results show that the involvement of children in media communications can have both negative and positive effects on their development. The extent of this impact depends on the characteristics of the media content and the children's readiness for its analytical and reflective perception. In this respect, watching cartoons and discussing their content with adults is a helpful developmental instrument.

Discussion

Researchers are unanimous in the opinion that cartoons can have a significant impact on the personality and behavior of younger viewers. At the same time, there are no strict scientific criteria for differentiating cartoons as potentially safe or dangerous for children. The same applies to algorithms for psychological analysis of children's media content.

Cartoons, whose impact on children is the focus of our study, are a complex system of structural components and specific relationships between them. However, when studying their psychological effects, researchers frequently consider only particular aspects. Thus, the psychological potential of a film can be assessed by identifying its main idea—what is this movie about? (Güneş et al., 2020). There is an opinion that only educational programs can be useful for preschool children (Hu et al., 2018).

In another group of studies, the attention of psychologists was focused on the imaginative system of the content. According to the authors, it is the artistic image that determines the viewer's involvement. This image, which is total, synesthetic, and involves all feelings (McLuhan, 1964), has a decisive effect on the emerging attitude toward the prototype. In this context, researchers analyzed the psychological impact of films with negative images of elderly characters (Rovner-Lev & Elias, 2020; Zurcher & Robinson, 2018). It was shown that the media image of a disabled person can form a respectful attitude toward differently abled people (del Moral Pérez & López-Bouzas, 2021). Russian researchers discovered cases in which the image of the mother in media products was distorted (Kazachenko & Kartushina, 2018; Shishova, n.d.).

N. Martins et al. were interested in the image of a film character as a decisive factor. When studying the viewers' attitude toward aggressive actions in sitcoms, they found that adolescents evaluate aggression on the screen depending on their sympathy or antipathy for the characters, rather than on the nature and strength of the aggressive action. According to the theory of disposition, emotional disposition toward a character determines moral indifference to their aggressive behavior and provokes the imitation of the same actions in reality (Martins et al., 2016). The duration of watching cartoons can also be considered a fundamental factor that determine their impact on the cognitive and social development of children (Hu et al., 2018). Researchers rarely focus on the psychological impact of film plots due to the complexity of their analysis in the disciplinary framework of psychology (Kazachiner & Tkachenko, 2020).

We believe that a psychological analysis of any media product, aimed at revealing its transformational potential, should involve a comprehensive analysis of its diverse components and interconnections. The complexity of the fictional world of a film or cartoon cannot be reduced to the main idea or individual images. Therefore, it seems unproductive to study media images out of the context of the entire narrative. It is the narrative that creates a media reality experienced by the viewers. An important criterion for the eventfulness of a narrative is its "consecutivity" manifested in the consequences for the thought and action of the affected subject (Schmid, 2010, p. 11). These consequences form the "expectation of consequences" in viewers, determining their behavioral patterns (Mayrhofer & Naderer, 2019). The narrative determines the extent of influence of a media product on its consumers. This function of the narrative is embedded in the very principle of its organization, which implies "crossing of a prohibition boundary" or "a semantic field" (Lotman, 1998) and violation of the rules that "preserve the order of this world" (Schmid, 2010, p. 8). The centrality of the narrative on an "out-of-bounds" event attracts the viewers' attention and determines its acceptance or rejection as an appropriate model of behavior based on experiencing the consequences of crossing the border. With a particular force, this formative mechanism is actualized in media communications, which frequently involve children's audience.

Cartoons are mimetic narrative texts. Therefore, their psychological study should be based on an interdisciplinary approach that appeals to narratology offering feasible algorithms for text analysis. The fictional nature of a mimetic narrative presupposes an appeal to the life experience of the viewer. Children lack such an experience and their perception is not mediated by the knowledge of the reality, whose distance from the virtual world becomes minimal in this case. Therefore, any psychological analysis of a text should follow the assumption that perception is determined not by the subject matter of a narrative (which is secondary), but rather by its formal elements, which, devoid of any referential meaning in themselves, gain a semantic function (Schmid, 2010). This assumption has determined our logic of analyzing cartoons, based on a consistent integration of methods applied in different disciplines and scientific paradigms for studying media texts.

The data obtained allowed us to develop and test hypotheses about the potential impact of media products on children. Our results, as expected, do not agree with those obtained by the studies that focused exclusively on the analysis of the content of media products. Thus, O. V. Kazachenko and E. A. Kartushina categorized the series "The Barkers" as productive for a child's development, because it projects a positive and traditional image of the mother. Their argumentation was that the mother of the Barkers had many children and the family implemented a democratic style of communication (Kazachenko & Kartushina, 2018). However, our multi-aspect analysis of this cartoon, as well as the study of its perception by younger schoolchildren, revealed a significant destructive potential of this popular media text.

Conclusion

The complexity of the problem of media influence on children's development requires the coordination of different paradigmatic approaches and algorithms for psychological analysis of media texts.

This research was conducted using the method of psychological analysis of a media text. This method is aimed at investigating specific features of the narrative, verbal presentation of the events taking place on the screen, as well as cartoon images, rhythmic, musical, and visual characteristics. We believe that only using a comprehensive analysis of a media work, one could understand the world it generates, the world in which viewers "have to lead their lives" (Luhman, 2000, p. 115). This statement gains significant importance in the case of children. Due the specifics of formation of cognitive and personal traits, children either lack or have minimal skills for distinguishing actual reality from a virtual reality and for reflecting on fictional media events.

The influence of animated cartoon images on children is determined not only by their specific presentation, but also by the totality of the characteristics of a media product. The conducted psychological analysis of three cartoons containing the mother image showed that these products have a different impact on children. Unfortunately, the formal labeling of these cartoons in terms of their psychological safety (followed by the parents) does not correspond to our conclusions.

The empirical study conducted to test the formulated hypotheses about the effect of cartoons on children showed that the semantics of the image of a cartoon mother is determined by elementary school students based on the external characteristics of the media world, which children perceive as real. A child does not develop a complex aesthetic response when perceiving artistic ambiguity, paradoxical, or comic situations (as adults view them); the processes of critical comprehension of the on-screen events are not yet actualized.

The importance of the mother image for the development of a child's personality, as well as the influence of cartoon images with a different psychological potential, determined the importance of studying the semantics of the word "mother" in the minds of elementary school students. Based on the data obtained, we conclude that children are dissatisfied with the maternal attention they receive. The low evaluation of the mother image according to the criteria of "understanding" and "prestige" was a rationale for conducting a developmental experiment aimed at correcting the mother image in the minds of younger children. The experiment confirmed that cartoons can be an effective means for forming and correcting a child's personality provided that (a) these cartoons meet the criteria of psychological productivity and (b) children watch and analyze the cartoon together with a psychologically and media competent adult.

The significance of the study lies in the development and testing of an algorithm for systemic psychological work with children's media content, which includes (a) its psychological analysis in order to substantiate the potential impact of cartoons on the viewers; (b) identification of the peculiarities of children's perception of the content addressed to them; (c) use of cartoons in the process of carrying out correctional work with children.

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ARTICLE

The Efficacy of a Holding Community Program—Promoting Social Reflection at School

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ABSTRACT
The authors developed a Holding Community Program to achieve the following objectives: (a) to increase the perspective-taking capacity of adolescents; (b) to promote interpersonal and intergroup harmony; (c) to empower school students to be more (pro)active in their communities and in public life. Apart from the intervention itself, the study comprised a pre-test and a post-test and involved a total of 240 Hungarian high school students (159 female, 66.3%). The students were aged 14–18 (M_{age} = 15.33; SD_{age} = 0.88). They were recruited from four high schools. Control groups (N = 122) were chosen from the same institution and graded as experimental classes (N = 118, 7 classes). Both immediate and long-term effects of the intervention (4–6 months after the intervention) were explored. Quantitative analysis of the data indicated that the two-day intervention program had significantly increased the students' perspective-taking capacity (short-term: $F(1, 238) = 6.03$, $p < 0.05$, long-term: n.s.) and efficacy beliefs (short-term: $F(1, 238) = 3.83$, $p = 0.052$, long-term: $F(1, 238) = 3.38$, $p < 0.05$). After the training, students were more willing to participate in collective actions (short-term: $F(1, 238) = 7.32$, $p < 0.01$, long-term: $F(1, 238) = 3.83$, $p < 0.05$). These results seem quite promising but the outcome was not significant regarding its effect on prejudice.

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Introduction

Institutionalized education is a constantly evolving social construct, which is changing alongside the understanding of knowledge construction, essential competencies, and the role of teachers and learners. Modernization of educational systems is a key issue in international policies, which in the last decade have highlighted the importance of learning in ensuring social mobility, equity, social cohesion and active citizenship (e.g., The Strategic Framework for European Cooperation in Education and Training: ET 2020). To achieve these objectives, it is necessary to enhance social and emotional skills because the development of these skills is crucial for promoting social inclusion and cohesion but also because of their importance for knowledge acquisition (Corcoran et al., 2018; Elias et al., 1997; Trilling & Fadel, 2009). Nonetheless, in general, national education systems still largely focus on fostering the students' academic performance rather than their social-emotional skills (Paksi, 2019; Sugimoto & Carter, 2015), the Hungarian public education system being no exception (Zsolnai et al., 2015). Furthermore, there is a perceived lack of preventive measures, e.g., strategies for prevention of abuse, violence and similar behaviour (Paksi, 2019). Hungarian society still has a long way to go in terms of social inclusion (Kende et al., 2018; Örkény & Váradi, 2010) and politically motivated intergroup violence is an existing problem (Faragó et al., 2019). From the psychological perspective, the implementation of widespread and evidence-based prevention programs remains an important educational goal for public schools.

Interpersonal Competencies: Essential, but Not Enough

Social and interpersonal competencies are seen as vital for academic progress of students (Webster-Stratton & Reid, 2004; Zsolnai, 2002) and also as essential for promoting diversity and inclusivity; for example, perspective-taking contributes to prosocial behaviour (Hodges et al., 2011), increases the propensity to help others and reduces outgroup bias (Batson et al., 2002; Vescio et al., 2003). Helping an individual to acknowledge that there is another viewpoint strengthens the self-other relationship by creating an overlap between the self and other cognitive representations: when people describe others, they tend to attribute a greater number of characteristics (especially positive) to the target of perspective-taking (Davis et al., 1996) and

perceive themselves as being closer to those whose perspectives they are taking (Myers & Hodges, 2012).

Although an attempt to discover shared reality may motivate perspective-taking, such motivation in itself does not guarantee its successful outcome (Hodges et al., 2018). In some cases, perspective-taking is used to reinforce the differences between the self and the other with the other being perceived as a threat. In these cases, perspective-taking increases avoidance and social distancing (Bigazzi et al., 2019; Hodges et al., 2018; Vorauer & Sasaki, 2009). It creates a barrier to one's understanding of the mental state of the other and impedes cooperation.

To prevent this rebound effect, it is important to ensure that competence development should meet certain requirements. To reduce negative biases, educators have to put effort into creating and maintaining a safe space (Twemlow et al., 2001), strengthen students' positive self-views (Todd & Burgmer, 2013), promote inclusive, complex identification—the process of associating oneself closely with other ingroup or outgroup individuals and their characteristics or views—(Brewer, 2000) and help students find common values and goals to overcome the differences between them (Allport, 1958; Aronson & Patnoe, 1997).

Identity in Play: Reducing Negative Interpersonal and Intergroup Attitude

In research literature, prejudice is usually defined as negative evaluations, beliefs, or feelings directed at people because of their perceived group membership. Several studies that compared populations of diverse background have found that people begin to develop prejudices at the age of 4 or 5, while adolescence is a critical period in which intergroup attitudes are formed and solidified (Aboud et al., 2012).

To explore, challenge, and overcome biases, various methods were implemented in recent decades. The *Common Ingroup Identity Model* (Gaertner & Dovidio, 2000) proposes that prejudice can be overcome with the help of recategorization. Members of different groups can share a common ingroup membership focusing on a more inclusive superordinate group representation. There is research evidence that shows that perceived shared identity leads to lower levels of intergroup threat (Riek et al., 2010) and to more positive evaluations of outgroup members (Guerra et al., 2013). The approach of *Dual* (Gaertner et al., 2016) and *Multiple Social Identity* (Brewer, 2000) takes into consideration the fact that apart from one common identity representation, separate/initial group identities can also be maintained within the context of a superordinate category. Some findings suggest that groups in a vulnerable position (e.g., minority groups) prefer a dual identity representation, where identification with the majority group does not require denial and devaluation of the minority position. Thus, people become more willing to address injustices without having to face a perceived identity threat. On the other hand, those in the position of power prefer a one-group representation because they are suspicious of any collective action that challenges the status quo or the boundaries of the majority group (Gaertner et al., 2016). The *Intergroup Contact Theory* states that under optimal conditions (equal status, common goals, no intergroup competition and authority sanction), increased

contact with outgroup individuals could lead to better mutual understanding, more positive intergroup attitudes, and willingness to engage in contact (Kende et al., 2017; Pettigrew, 1998, Pettigrew et al., 2011). Even an indirect, vicarious contact (e.g., by observing members of outgroups through the mass media or having a friend who knows someone from an outgroup) can be beneficial (Paolini et al., 2004). Thus, even indirect exposures can provide counterstereotypical information that may change the pre-existent intergroup representations.

Within educational contexts, the *Intergroup Dialogue* is a similar pedagogical approach that seeks to establish a common understanding among the people whose social identities and life experiences differ from one another (Ford, 2018). In line with our approach, the goal of the Intergroup Dialogue is to create a space that would promote the exchange of different perspectives and seeking mutual understanding. It also addresses the issues of collective identity and promotes discussions on how to overcome intergroup conflict, which keeps individuals alienated from others, through non-violent and collaborative negotiations. Among young adults, participation in the Intergroup Dialogue has proven effective in fostering cross-cultural communication and creating awareness of social justice issues (Ford, 2018; Hammack & Pilecki, 2015). One question remains open: How can be prejudice reduction effective when the target of prejudice is not part of the dialogue? It is important to reduce uncertainty by getting to know outgroup members and thus improve the intergroup relationship, but in educational settings sometimes a specific constellation of diversity is not available or is less accessible. Not to mention how can psychological intervention make a difference for empowering adolescents living in contexts where discrimination is socially acceptable or even supported?

Foster Holding Communities

In their school years, children prioritize peer opinions and tend to identify with certain social groups. Peer group norms and attitudes become increasingly relevant and solidify in adolescence (Nesdale, 2007; Raabe & Beelmann, 2011; Váradi, 2014). Programs to prevent outgroup discrimination beyond any doubt should take into account the potential power of these increasingly important peer relationships. Promoting positive relationships and reciprocity between students is the key to cultivating an optimal learning environment in schools and promoting reflectivity, which can provide a fertile ground for social awareness.

The concept of a holding environment was first introduced in developmental and psychoanalytic research literature (Winnicott, 1965): according to this concept, optimal development depends on the mother's and attachment figure's ability to provide the child with a safe enough space to move gradually toward autonomy. Failures and acts of reparation provide opportunities for the child to experience the unknown and different perspective, giving them space to practice, change, and develop. In a good relationship, acceptance and mentalization (Fonagy et al., 1991)—the ability to reflect upon and to understand one's state of mind—leads to self-acceptance, self-reflection, and capacity for self-regulation. This dynamic over

the last decades has been broadened from dyadic relationships to the group level: peer consultation groups (Minkle et al., 2008), work (Kahn, 2001), school (Hyman, 2012; Twemlow et al., 2001), and communities (Bigazzi et al., 2020; Jovchelovitch & Concha, 2013). In these settings, each member of the group shares the responsibility to support other group members, to create a safe space for conducting intrapersonal and interpersonal work, and to contribute to socially responsible efforts.

If children feel criticized or conditionally accepted in their school community, they may internalize the attitude that contributes to limited self-worth, feelings of isolation, while the feelings of acceptance and belonging provide the support necessary for people to thrive. An environment of acceptance minimizes the threat-induced defensiveness and enables children to work with self-other differences and create an inclusive space where new social perspectives and cognitive alternatives may emerge.

Youth empowerment and psychoeducational work should involve the entire school community (Twemlow et al., 2001). Children and adults are active agents whose reactions alter the dynamics of power by supporting or hindering others. If we enable students to be reflective, they will be able to manage social interactions on their own and actively participate in social life not through the absorption of ready-made knowledge or the compliance with rules, but through dialogue and construction. On the other hand, teachers should also realize that they are part of the community and their (lack of) actions will have an impact.

Human interactions do not happen in a vacuum. From the socio-psychological perspective, youth empowerment should involve the whole community. A planned intervention should take into account not only its object, but also the social context that will be influenced indirectly by the intervention. Disadvantaged groups are often the target of interventions, while these interventions do not work with whole community that these groups are part of. When empowered members of the disadvantaged groups reposition themselves, they also reframe their relations with others, with the members of the whole community. If these others are not involved and strengthened to accept the change, the intervention loses some of its efficacy. The overlooked inequalities and power imbalance cause conflicts where neither the members of the majority nor the members of minority groups can engage in a safe dialogue. In this process, the indirectly involved actors should be

> aware of their superior power positions and make constant efforts to deconstruct them. Deconstruction is a prerequisite for changing the dominant forms of communication, creating space—an incubator—where new social realities and cognitive alternatives may emerge. In this space, minoritized or disadvantaged groups can elaborate their own perspectives, test the validity of possibilities, and later construct and disseminate their own versions of reality. (Bigazzi et al., 2020, p. 131)

To enhance prosocial attitudes and active citizenship, it is important to strengthen social-emotional competencies and critical thinking skills of community members.

Intervention

The Holding Community Program (HCP) that we have designed is based on the methodology of conflict resolution and on the existing research evidence on complex social identity, intergroup dialogue, socio-emotional competence, prejudice reduction and human rights education.

The HCP aims to facilitate the dialogue between the students to promote critical thinking and to exploit the power of peer influence thereby stimulating the co-construction of knowledge. The HCP encompasses an intensive two-day training and utilizes non-formal education methodology (Hamadache, 1991; Latchem, 2014) for experiential learning and knowledge co-construction. To ensure active learning, the ERR *(evocation-realization-reflection)* teaching framework was also used (Bárdossy et al., 2002). In line with the ERR framework, within each uninterrupted intervention period, three phases of the learning process were realized: the evocation stage (students are encouraged to think about what they already know); realization of the meaning (students are expected to come into contact with the new information); and reflection stage (students express their ideas and expand their own understanding). Specific techniques such as kinetic icebreakers, modelling, role playing, small group cooperation, sharing of personal narratives and reinforcement of positive interactions were used in order to stimulate communication.

The first day of the program is focused on the relationship between the self and the other. After the mutual trust between the participants is established, the training process concentrates on the following six objectives: first, to raise the awareness of the complex nature of (social) identity; second, to strengthen the feeling of community by paying attention to similarities and differences; third, to practice recognition of each other's emotions and mental states, to practice perspective-taking within the comfort zone; fourth, to practice mentalization and assertive communication in emotionally saturated, conflictual situations; fifth, to explore the psychological consequences of inclusion and exclusion and, finally, to discuss the values that are prevalent in society.

The second day takes further the results that have been achieved in the first day. The relationship between the self and other is expanded by adding the intergroup context and horizon of action to the dialogue. The objectives of the second day are as follows: first, to create awareness and critical understanding of the dynamics of power, socialization, and social inequalities; second, to experience the impact of stereotypes by taking the perspective of the privileged and disadvantaged; third, to explore the processes leading to discrimination and hate crimes; fourth, to strengthen the active bystander attitude and prosocial behaviour; fifth, to enhance self-efficacy in handling sensitive social issues and, finally, to discover cognitive alternatives for collective action.

Research Objective

This study aims to evaluate the results of the Holding Community Program. We expected that the adolescents who took part in this experiment would show better results in perspective-taking (primary outcomes). Furthermore, we assume that the

improvements in social-emotional competencies would lead to the improvements in prosocial behaviour and help the participants overcome their prejudicial attitudes (secondary outcomes).

Method

Procedure

The study used a non-randomized pre-test in combination with an immediate post-test and a delayed post-test. The program in the experimental classes was launched two to three weeks after the pre-test. The first post-test was administered immediately after the intervention, while the follow-up post-test was administered 4–6 months after the first post-test. The answers from the control classes were collected in the same periods as from the experimental classes. Classes of students were assigned through convenience sampling to the target group and control groups, and comparative analysis was conducted to ensure that there was no preliminary difference. The interventions were carried out with complete classes by two or three psychologists and consisted of two full day sessions per class. In total, five instructors participated in the research. The control group followed their regular curriculum. To ensure the ethical treatment of the participants, the experiment was approved by the local ethical board, the consent of both students and parents was obtained prior to the experiment.

Participants

In the pre-test and post-test, a total of 240 students participated (159 girls, 67%; Age: 14–18, M_{age} = 15.33; SD_{age} = 0.876). The four schools where the experiment was conducted were situated in Pécs, Hungary. Although the size of the classes sometimes varied, from each school an almost equal number of experimental and control classes took part and the age groups were identical. The effects of the intervention were further investigated with the help of a four to six-month follow-up test in which 125 students participated (92 girls, 74.6%; Age: 14–17, M_{age} = 15.25; SD_{age} = 0.922). Since the follow-up test coincided with the introduction of the distance learning mode due to the COVID-19 pandemic (the spring of 2020), many students declined to invest their time in the delayed post-test (the attrition rate was 48%). Comparative analysis was conducted to ensure that there was no difference between the dropouts and remaining participants in the relevant variables.

Instruments

First, the students were asked to provide their demographic data: age, gender, grade, and place of residence. After the demographic questions, all the other scales were measured on a 6-point Likert-type scale (1 = Strongly disagree/not at all, 6 = Strongly agree/Certainly). Since we planned to repeat the questionnaire survey, it was important to keep the questionnaire package short to ensure that students can pay sufficient attention.

To assess **perspective-taking,** we used the Interpersonal Reactivity Index (IRI, see Davis, 1983; Hungarian version in Kulcsár, 2002, pp. 411–427). The IRI

is a self-report measure of individual differences in empathy with four subscales (personal distress, fantasy, empathic concern and perspective-taking). In our study, we administered the perspective-taking subscale (7 items), which measure the ability and tendency to look at the world from somebody else's point of view, e.g., *When I'm upset at someone, I usually try to "put myself in his shoes" for a while*. Cronbach's alphas at the pre-intervention, post-intervention and follow-up stages were .697, .765 and .747, respectively.

To assess **Identity Threat,** we used relevant scales of the Multiple Threat and Prejudice Questionnaire (MTPQ, see Bigazzi et al., 2019), which captures the subjective sense of danger and fear related to different identity aspects. *Bio-National Identity* in this questionnaire is based on the exclusive perception of belonging to a certain nation, rooted in one's biological heritage. In this case, the threat is seen as a genetic contamination of target groups (e.g., *I think there is a real danger that white people become a minority in our homeland*), while *Gender Identity* is worded around the traditional representation of gender roles (e.g., *I would feel upset if I were considered a homosexual*). We adjusted this instrument to make it more suitable for our age group, but the internal validity for these scales proved to be satisfying through time: Bio-National .797, .814 and .784; Gender .804, .846 and .854.

We adapted the Social Distance Scale of Bogardus (1933) to capture **prejudice** (this instrument was applied in other studies—see, for example, Faragó & Kende, 2017; Orosz et al., 2016). We measured the degree to which respondents would be willing to accept a member of each outgroup (e.g., Roma, migrant, homosexual) as a member of their class (1-1 item). Higher scores indicate higher levels of prejudice in this instrument. In selecting outgroups, we sought to cover the most relevant minorities in the Hungarian context.

We aimed to shed light on adolescents' motivation to participate in social actions, in other words, we were interested in how adolescents perceive their ability to participate in superordinate group matters and how willing they are to participate in collective action to improve intergroup relations and reduce social inequalities. **Efficacy beliefs**, which will be understood here as one's feeling that s/he is able to contribute to societal life, were measured with the help of the two items designed for this study: *To what extent do you feel that you can take an active part in what happens to the Hungarians?* and *To what extent do you feel that you can take an active part in what's happening to people around the world*? The alphas were .700, .729 and .784. **Collective action** was measured with the help of an item concerning the respondents' willingness to participate in collective action to increase social justice, therefore, it captures their intention to act rather than previous attendance. Students were asked to evaluate the following statements: *I would like to organize programs to help the disadvantaged groups at school; I would like to go to a school community service for an organization that represents the interests of a disadvantaged group*; and *I would love to participate in a program aimed at reducing prejudice.* The internal validity for this scale was acceptable through time: .799, .886 and .902.

Results

The statistical analyses were performed using IBM SPSS Statistics 25. Baseline equivalence was assessed to ensure that the experimental and control groups were not statistically different for the measured variables. For this purpose, the Independent Samples t-Tests were performed to compare the pre-test scores. The results showed the desirable correspondence (means and standard deviations are provided in Table 1).

Immediate Effect

Paired t-tests were first conducted to find possible differences between the pre-test and post-test scores in the intervention and control groups. The results we obtained seemed quite promising as we found significant differences between the groups (Table 1). To test our hypothesis that the intervention would change the outcome variables, we then performed repeated measures ANOVA with INTERVENTION (the person participated in the Holding Community Program or not) as a between-subjects factor, and TIME (pre-intervention and post-intervention) as a within-subjects factor. The interaction effects are presented in Table 1.

The HCP was an effective tool to develop perspective-taking: after the training, students were more willing to participate in collective actions. Compared to those in the control group, participants of the intervention group tended to accept members

Table 1

Means and Standard Deviations in the Pre- and Post-test Scores for the Intervention (n = 118) and Control (n = 122) Group

	Intervention			Control			Pre-test (intervention vs. control) t(238)	Repeated Measures ANOVA (1,238)
	Pre-test M (SD)	Post-test M (SD)	t(117)	Pre-test M (SD)	Post-test M (SD)	t(121)		
Perspective taking	4.13 (0.84)	4.36 (0.91)	–3.49**	4.01 (0.756)	4.02 (0.81)	–0.22	1.18	6.03*
Bio-National Identity Threat	3.00 (1.42)	2.70 (1.32)	2.96**	2.66 (1.33)	2.55 (1.19)	1.20	1.94	1.96
Gender Identity Threat	4.1 (1.58)	3.77 (1.60)	2.98**	4.08 (1.58)	3.96 (1.63)	1.26	0.05	1.97
Prejudice (Roma)	2.98 (1.62)	2.48 (1.58)	4.55**	2.62 (1.58)	2.41 (1.47)	1.93	1.74	3.58 ($p = 0.060$)
Prejudice (Homosexuals)	2.25 (1.69)	2.11 (1.58)	1.51	2.95 (1.57)	2.24 (1.63)	0.55	–0.19	0.37
Prejudice (Migrants)	3.07 (1.77)	2.62 (1.69)	3.42**	2.96 (1.75)	2.65 (1.65)	2.77*	0.52	0.70
Efficacy Beliefs	2.96 (1.34)	3.19 (1.33)	–1.72	2.75 (1.33)	2.67 (1.25)	0.92	1.18	3.83 ($p = 0.052$)
Collective Action	4.17 (1.28)	4.38 (1.35)	–2.24*	3.94 (1.26)	3.80 (1.36)	1.55	1.38	7.32**

Note. * $p < .05$ ** $p < .01$

of the Roma community and believed themselves to be able to take a more active part in social life. Members of the intervention group had lower scores on the explicit measure of threat and prejudice toward migrants and therefore showed a desirable change in their attitudes although it reached the conventional levels of significance only in the t-test. The repeated measures ANOVA revealed no significant interaction effect (see Table 1).

The study's findings confirm the short-term effectiveness of the HCP, which appears to increase the perspective-taking capacity of adolescents and motivate them to be an active part of their environment.

Follow-up

Due to the high attrition rates, the Independent-Samples t-tests were carried out to compare the dropouts and remaining participants. The results show that there was no significant difference in terms of age ($t(238) = –1.579$, $P = 0.116$) and most of the observed variables at the baseline (see Table 2). However, more boys than girls tended to drop out ($\chi^2 = 6.30$, $P = 0.12$) and those who did not complete the follow-up questionnaire showed a perceived greater threat to their gender identity ($M_{remaining} = 3.85$, $SD_{remaining} = 1.62$, $M_{dropouts} = 4.35$, $SD_{dropouts} = 1.51$) in the pre-test. The combination of these results is consistent with the previous findings of the studies using the MTPQ, where men were found to be more susceptible to the gender identity threat than women (Géczy & Varga, 2019).

Table 2

Means and Standard Deviations in Pre-, Post- and Follow-up-test Scores for the Intervention (n = 80) and Control (n = 45) group

	Intervention			Control			Pre-test (remaining vs. dropouts) t(238)	Repeated Measures ANOVA (1, 238)
	Pre-test M (SD)	Post-test M (SD)	Follow-up-test M (SD)	Pre-test M (SD)	Post-test M (SD)	Follow-up-test M (SD)		
Perspective taking	4.16 (0.77)	4.44 (0.89)	4.31 (0.88)	3.80 (0.71)	3.95 (0.85)	3.97 (0.80)	–0.79	0.61
Bio-National Identity Threat	2.91 (1.35)	2.65 (1.23)	2.55 (1.35)	2.45 (1.44)	2.38 (1.11)	2.15 (1.21)	–0.95	0.52
Gender Identity Threat	4.00 (1.56)	3.56 (1.61)	3.67 (1.67)	3.57 (1.69)	3.30 (1.54)	3.35 (1.66)	–2.50*	0.28
Prejudice (Roma)	2.82 (1.57)	2.33 (1.49)	2.23 (1.41)	2.40 (1.66)	2.16 (1.33)	2.22 (1.58)	–1.20	1.94
Prejudice (Homosexuals)	2.19 (1.63)	2.01 (1.47)	1.89 (1.35)	1.96 (1.36)	1.84 (1.43)	1.87 (1.46)	–1.71	0.61
Prejudice (Migrants)	2.90 (1.77)	2.49 (1.65)	2.38 (1.55)	2.64 (1.79)	2.36 (1.53)	2.31 (1.52)	–1.93	0.29
Efficacy Beliefs	2.88 (1.34)	3.22 (1.29)	2.97 (1.37)	2.68 (1.30)	2.40 (1.12)	2.39 (1.14)	–0.61	3.38*
Collective Action	4.20 (1.31)	4.55 (1.33)	4.28 (1.48)	4.00 (1.15)	3.75 (1.34)	3.75 (1.24)	0.94	3.83*

Note. * $p < .05$

To test whether these effects would persist over time, repeated measures ANOVAs were conducted again, with three time points. While the change in collective action remained significant, the effect of the improvements in the perspective-taking capacity faded over months. Interestingly, the interaction effect on perceived efficacy became greater (see Table 2).

Discussion

The goal of this study was to measure the effectiveness of the HCP aimed at the development of perspective-taking, reducing prejudice and promoting active participation. Our findings suggest that this intervention can enhance social-emotional skills and civic engagement. Moreover, it encouraged student reflection about matters of social diversity and inclusivity. The intervention was less effective in dealing with prejudice. This result can be explained by the fact that the prejudice against minority groups has been strongly institutionalized in Hungary in the last decade. Declaring a positive attitude towards institutionally discriminated minority groups means not only reframing one's relationship with the minority members but also taking a stand against the authorities and political institutions normalizing such prejudice and discrimination. We might suggest that more targeted programs are needed to deal with the prejudice against specific minority groups.

The result shows that a change in perspective-taking was detectable but it has not persisted in the long-term, underlining the greater importance of systematic prevention and long-term intervention planning. Likewise, it deserves our attention because most research involving psychological field experiments merely focuses on the immediate effect (Paluck & Green, 2009) rather than long-term effectiveness.

When we asked the students how they benefitted from the program, they reported that the program helped them acquire new knowledge about the member of different groups and bond with them. They also said that they learned "new things about how to deal with different challenges in life" and realized their role in eliminating external stereotypes.

During the training sessions, students often demonstrated a fairly limited experience of social life. Research shows that engaging in collective action beyond educational settings often remains suspended in the absence of cognitive alternatives (Tajfel, 1978). We suggest that, in order to stimulate critical social awareness, educators should create more opportunities for exploring together with students' collective actions and their possible consequences.

Although we think that these results contribute to the psycho-educational field, some limitations of the study should be noted. Although the instruments we used have adequate psychometric properties, self-report measures can be subject to bias. In future studies, it would also make sense to enrich the self-administered questionnaires with more qualitative data and behavioural observations, which may provide us with some deeper insights. Further research may also explore the effects of longer interventions for the achievement better results sustainable over time.

Moreover, further research should also investigate if the effects of this intervention differ for those in the majority or minority positions. Another question worth analysing is how the impact changes for those who belong to minority groups in a broader social context but belong to the majority in their class. As empowerment cannot happen in a vacuum (Bigazzi et al., 2020), these conditions presumably alter the identification and development processes.

In conclusion, we found that the HCP is suitable for fostering positive interpersonal competencies. This tool can be used to encourage young people to reflect more on the world around them, in particular on the issues of social inequality. Educators should invest more energy into creating an inclusive space where students will be able to explore perspectives without the fear of being questioned.

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ARTICLE

Time Allocation and Economic Contribution of Women in Fulfilling the Basic Needs of Poor Households

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ABSTRACT

The primary purpose of this study is to explore the time allocation and economic contribution of women in fulfilling their families' basic needs. This research used a qualitative approach and applied observations and interviews as the data collection technique. The research sample consisted of 25 people, including 23 stone-breaking women, who have a family, and 2 village heads, whose village areas contain stone-mining enterprises. The obtained data was analysed qualitatively, implying that the processes of data collection, data reduction, data display, and data verification were carried out simultaneously. The results of this study show that the respondents allocate more time to household chores than to stone-breaking work. However, through the activities as a stone breaker, homemakers do make a significant economic contribution to the family's income. Indeed, the sole reliance on the husband's income as the head of the family cannot be sufficient for fulfilling the basic needs. The husband's income only serves to maintain the survival of the family.

KEYWORDS

time allocation, economic contribution, women work, basic needs, poor households

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Introduction

Poverty is a state or condition in which a person, household, or community lacks the financial resources for a minimum living standard. Poverty is a serious issue facing both developing and underdeveloped countries, including Indonesia. In Indonesia, many people experience a lack of a supportive environment leading to a restricted access to opportunities. Indeed, this influences the capability of facilitating the affected community's welfare. According to Naschold (2012), structural poverty traps perpetuate the poor and the vulnerable (Naschold, 2012). Generally, developing countries are still experiencing difficulties in providing access to welfare for the poor in society (Carrard et al., 2019; Peters et al., 2008). Conditions of poverty are usually assessed in monetary terms using information on household consumption expenditure and data on commodity prices (Ngo & Christiaensen, 2018). Poverty is usually based on per capita income or expenditure; however, it is also known that these constraints have weaknesses due to their ability to simplify its meaning to the poor (Karlan & Thuysbaert, 2019).

Poverty is a multidimensional phenomenon pertaining to numerous aspects, such as low economic growth. A more growth-oriented development paradigm that has been applied in developing countries has given rise to structural poverty (Bétrisey et al., 2016). Therefore, the quality or state of being poor encourages social gaps inseparable from a nation's development. People living in poverty do not have isolated living environments unless they live in a specific social habitus that depends on others and institutions for survival. Many governments and non-governmental social institutions make attempts to reduce poverty by supporting the basic needs of people unable to earn sufficient income. According to Nooteboom (2015), private and public institutions performing the state's role and the policymakers responsible for development need to ensure that the rate of poverty within an environment is significantly reduced (Nooteboom, 2015, pp. 280–294).

As a rule, poor people have a high fighting spirit used to defend themselves and work hard to achieve daily needs. However, in most cases, this spirit is unable to provide a decent life (Hos et al., 2019). Domestic workers in Turkey demonstrate high fighting power when commuting to the city's outskirts, spending hours carrying out household duties in an employer's house and returning home to attend to their family (Erman & Kara, 2018). In understaffed conditions, women play an essential role in sustaining the economic resilience of poor households. The increasing cost of living encourages homemakers to work for a living (Samargandi et al., 2019). Furthermore, poverty has encouraged many women in South Asia to become agricultural workers forced to work to meet their families' basic needs (Rao, 2020). One example of women's role in fulfilling the economic needs of low-income families is found in a stone-breaking company in the North Moramo district of South Konawe Regency (Makmur & Sahrun, 2017). Many families here participate in stone breaking, which involves carrying building materials for mixed cement cast.

Women, traditionally known as the weaker gender, work as stone breakers in Indonesia. Their involvement, especially of housewives, helps alleviate poverty,

thereby providing essential needs. However, the process of balancing work and household chores is one of the most significant challenges faced by these categories of women (Srivastava & Cheema, 2019). In addition to housework, these housewives also need to fulfil their activities as stone breakers (public affairs). Social norms still provide women with the obligation to carry out their household activities, and this view is accepted without questioning (Bittman et al., 2003). In addressing the increase in workload, some women demand workload distribution with their partners and other family members (Komatsu et al., 2018). The workload distribution happens because the dual role breeds the necessity to share a woman's time between two main tasks: homemakers and stone breakers.

Women's involvement in stone-breaking activities that are included in heavy and abusive work certainly has a subjective motivation known as background. Limited access to decent work with a fair wage has forced housewives to undergo heavy and rough activities such as stone breaking (Chakraborty, 2019; Ibáñez, 2017). According to Laranjeiro et al. (2020), limited access to a decent job is mainly due to a lack of skills, which is the main driving force of women's involvement in stone breaking. Furthermore, in most cases, women join this occupation to support their husbands' income to meet their families' needs.

Based on the explanation above, this study aims to analyse women's time distribution as homemakers and stone breakers. This study also aims to determine the income contributions of stone-breaking workers to the family income.

Research Methods

This research used a qualitative approach. This research was conducted inductively based on the logic procedures derived from the particular proposition in describing information. The study started from an observation over the research objects and ended at the conclusion (new knowledge) as a common hypothesis. The research was done by studying humans' behaviour in the context and situation in which they are located; understand human behaviour based on their point of view; deep observations and interviews based on collecting critical data.

The data collected in this study was obtained through in-depth interviews with respondents. In addition, a direct observation of social processes was conducted. Methodologically, suppose the research is considered to be a sample use. In that case, it is more precisely referred to as snowball sampling, in which data extraction is carried out from various sides until it reaches information saturation. Long before the research was conducted, there had been an inadvertent observation of stone-breaking women's activities every time we visited the site for various affairs. Observations were made on social practices, expressions, and facts related to stone-breaking activities carried out by women and connected to their activities to take care of the family as housewives. Furthermore, in-depth interviews were conducted to determine the subjective meaning and provide a deeper understanding of the observed social practice phenomena. Before conducting an interview, the researcher first asked the informant for permission. Until the research process was complete, no informants

objected to being asked for information. Interviews were conducted at work with an atmosphere of familiarity. An informant answered each question in detail while continuing to carry out her stone-breaking activities. Both observations and in-depth interviews were conducted repeatedly to obtain accurate information.

The sample consisted of 25 informants comprising 23 research subjects (stone-breaking women) and 2 village heads who live in villages located in stone-mining areas. At the beginning of data collection, we faced difficulty in meeting informants due to the prolonged period of heavy rain. At the first interview, the mining site seemed totally deserted. The activity of breaking stones is usually suspended during the rainy season or when the stone is too wet to break. Another difficulty was connected with gathering information about the income and expenses involved with stone-breaking activities and household purposes. Generally, the informants could not provide exact figures because they had never recorded any of their income and expenses. These difficulties were overcome through data mining by applying data triangulation models and triangulation of data collection methods. We checked the correctness of information from several informants and used several ways of collecting data. Moreover, intimate relationships with informants created by occasionally tucking humour and jokes into the interview process allowed us to increase the validity of research information.

Over time, through a fairly lengthy process and intensive and repetitive interactions with informants, the required data was collected. Although the data was not be considered 100% reliable, it could be used as a foothold to select categories to find core or major categories in data analysis. The process of collecting and interpreting data was simultaneously conducted throughout the research process. The process of translating data in this study followed Huberman & Miles (1994) where data reduction activities, presentation, and verification are interconnected activities before, during and after the parallel collection of data (Bokiev & Samad, 2021).

Results and Discussion

Time Allocation for Women as Housewives and Stone Breakers

Time allocation or time management is a consequence of a housewife's involvement in making a living. They have to divide their time between two main roles, namely as a housewife and as a breadwinner, to ensure everything is appropriately conducted. Typically, the allotted time given to take care of the family is also adjusted to enable them to work and earn some money. These categories of women usually carry out household affairs before breaking rocks. The timing used to make a living and take care of the household for stone-breaking women dramatically determines the level of income and the quality of household management (Seymour et al., 2019). However, when both are compared, the time used to perform home activities is greater than the stone breaking process. This trend is backed by the level of education and skills of stone-breaking women, which are generally low. Therefore, the allocation of time used is still more dominant to work without wages in the household. These findings are consistent with research by D. Salehi-Isfahani and S. Taghvatalab in Iran (Salehi-Isfahani &

Taghvatalab, 2019), which show that more educated women tends to allocate more time to jobs. In India, there is also a limited access to decent jobs for poor women from less-educated households (Singh & Pattanaik, 2019).

When compared to men (husbands), the time used by women to fulfil household chores is more significant. These findings are relevant to Vu's study in Vietnam (Vu, 2019), which stated that husbands spend 40.3–58.6 fewer minutes each day than their wives in terms of housework. In addition, dual roles spend more time working and increasing workloads for households. The division of work and the allocation of working time between husband and wife are significantly related to the local community's culture (Pollmann-Schult, 2016).

One of the stone-breaking female informants (HRTN, 27 years old) states that she breaks stones every day while also cooking at home to ensure the availability of food for the family. However, their husbands tend to assist in cooking when their wives are sick or need to attend to activities outside the village. However, this is also infrequent because they always prepare food when a plan comes up to leave the house. Similarly, these men take care of the laundry and sometimes take their children to school in their wives' absence. Meanwhile, in terms of house cleaning, they ultimately carried out the process except on specific occasions when their husbands volunteer to help. These findings indicate that the time allocated to carry out certain activities is associated with availability and gender (Adjei & Brand, 2018; Pailhé et al., 2019).

HRTN's statement represents the overall division of work in a stone-breaking family. These findings support the time allocation theory, in which married women with many household chores give preference to domestic time with fewer working hours (Sakanishi, 2020). A woman as a housewife has the dominant task of completing domestic affairs. This condition necessitated a stone-breaking housewife to smartly divide the time in carrying out both affairs every day. According to Nordenmark (2013), the tendency of women to accept unbalanced workload without resistance as shown by stone-breaking women, suggests that their social context is still influenced by conservative gender ideology (Nordenmark, 2013).

There are three types of stone-breaking working women. First, those who work on stone owners in certain places, along with other workers. Second, those who work breaking someone else's stone brought at the place of the woman's residence. Third, women breaking the stone brought from a mining site and delivered back when the work is ready. The first and second types are categorized as mining labour, because women work in favour of other parties to earn wages and are often powerless in managing time and demanding a more decent wage, despite being regulated by the law. The research carried out in India revealed that the wages of the majority of domestic workers is still under the standard minimum amount (Gudibande & Jacob, 2020).

For stone-breaking woman, arranging their time is rather problematic because the time hours are determined by the stone owner: starting from 07:30–10:00 and continued from 14:00–17:00. Therefore, household affairs are fulfilled in the morning before 07:30, noon between 10:00–14:00, and in the afternoon from 17:00 till evening.

These workers practically do not have some time off, except at night around 21:00. Furthermore, those with young children are forced to take them to work sites because there are no adults at home to look after the children.

The second type of stone-breaking women slightly benefited from the workplace located in their yard. Therefore, they can carry out their housework and breaking the rocks concurrently. Hence, there is no time-use pattern that explicitly separates the living and household work time. However, when viewed in terms of allocating the time required to complete the work, the second stone-breaker type remains similar to the first type because both remain tied to the owner of the stone. Therefore, the difference is only related to the workplace and the opportunity to carry out concurrent housework.

However, those who belong to the third type of stone breaker are a little freer because they set the working time according to their desires and capacity. This is possible because the workplace is located close to their yard. Therefore, they have the opportunity to do household chores while breaking stones well. They can also freely set the rhythm of their work without pursuing settlement targets by other parties. In general, household chores, such as cleaning or sweeping, washing clothes, caring for children's school, and cooking, are performed before 08:00. During the day, i.e., between the hours of 11:30–15:30, cooking chores are performed, while from 17:00–21:00, from late afternoon to night, cooking, caring for school children's preparation, and folding clothes is conducted. Breaking of stones is generally performed at 08:00–11:30, which is continued from 15:30–17:00. When time is allocated in this manner, these workers can rest while conducting house chores, especially during the daytime after lunch and in the evening from 17:00 hours after preparing dinner for their families.

Preliminary studies have shown that stone-breaking women have a much heavier workload compared to men (husbands). During the break, which is usually from 10:00 to 14:00, the housewives return home to prepare lunch for their family. Therefore, they have no time to take a rest. However, this is opposed to their husbands' break time, whereby they tend to take a rest or take a nap before leaving for work again. Furthermore, in the evening, these women are usually busy preparing dinner, folding clothes, and preparing stuff for children's school, the husband also takes time to rest. These findings indicate discrimination, which gave rise to inequality in family workload distribution (Stepanikova et al., 2020). There are still structural and cultural barriers to building gender equality in workload distribution (Amâncio & Correia, 2019; Ocampo Castillo, 2019).

Changes in work roles often lead to advancement in the family role that ultimately affects marital satisfaction (Gordon & Whelan-Berry, 2005). When domestic and public roles change, marriage problems also advance. Therefore, each pair needs to devise a strategy that best suits their needs, values, and life situation. Traditionally, a husband's career is the most important. However, this is not the case due to some considerations such as a low-income husband while the wife has the opportunity to work to supplement the family income, therefore the spouse agrees to take turns taking care of the household or the wife stops working for a living (Perrone & Worthington, 2001).

It is essential to realize the role equality between husband and wife, especially for couples that work together to earn a living. There is no clear guideline on duty division in most cases, thereby giving rise to gender discrimination (Himsel & Goldberg, 2003). A stone-breaking woman's dual role associated with imbalance is one of the forms of gender discrimination in poor households, a common practice in developing countries (Kizilova & Mosakova, 2019). Therefore, the same perception of gender justice needs to be built between husband and wife because it is an essential contributor to the satisfaction of a marriage between a working couple (Frisco & Williams, 2003). In couples, where both works to earn a living, the roles in performing household chores should be divided such that to best fit the needs and values of the family.

Economic Contributions of Stone-Breaker Women in the Family

Due to the rise in staple prices, the socio-economic difficulties encouraged housewives in the North Moramo district to indulge in the stone breaking process to assist their husbands in meeting their families' needs. Women carry out this stone breaking activity under the implementation of duties as housewives, which are their obligations and responsibilities as wives according to the existing cultural norms. An example of this case occurred much earlier in the nineteenth century in America, where homemakers carried out house chores such as cooking, clearing, transporting water and childcare, which is currently a paid job market (Bradbury, 1984). However, in North Moramo, stone-breaking women continue to carry out the housework while earning a living by breaking stones.

The income earned by female stone breakers varies because it depends on the amount of time allocated to breaking stones and the volume of performed work (splintered stones). According to NLN (34 years old), a stone breaker since 1997, her income was sourced from wages by splintering stones into several to achieve IDR 250,000 or $17.73 per-truck, usually obtained within a week without rainfall. The money can then be spent on daily necessities such as rice, fish, vegetables, and sometimes for schoolchildren's needs. According to NLN, the stone-breaking activity is uncertain and dependent on the weather. For instance, during rainfall, the stone becomes hard to break, reducing the volume of work and wage.

NLN further stated that, although wages were set according to the work volume, each stone breaker's income gained per month differed. In addition to the different working capabilities, wages were also influenced by uninterrupted supply of raw materials from mine owners, which depended heavily on users' split requests. Sometimes, job orders are delayed due to inadequate splintering of stones.

Similar to NLN, SMRM (37 years old) stated that the obstacles they often experienced were frequent rain and unavailability of the material from their boss due to the inability to transport previous work. This point shows that breaking stones is volatile, sometimes smooth, and challenging in obtaining a job order. In the presence of a sudden rainfall, workers are unable to work. Similarly, when the splintered stone has not been transported, they cannot receive the next job from the mine order, thereby affecting their income.

The description above represents the first type of stone-breaking income, when the work is determined by the terms set by the quarry owner.

The second type of stone breakers (NL, 47 years old) revealed in an interview that the mine owner drove stones to her yard for breaking and splitting. According to NL, one truck of stone comprises about 5 cubes, with an average of splintered 50 carts completed in one week to earn wages worth IDR 5.000 or $0.35 per-cart. Therefore, based on this narrative, it is noted that when work is smoothly performed, an average income of IDR 1 million or $70.92 per month is generated. This is similar to the income gained by the first stone breaker type. The difference is that the second is more profitable because they work from the comfort of their home. However, the first-type stone breakers cannot afford such a model because their houses have no road access for truck cars.

The third type of stone breakers enables workers to break stones independently by purchasing the stone in the mining site and bringing it to a place for splintering. Mrs. MN (62 years old), a stone breaker of this type, stated that stones are sold for IDR 200,000 or $14.18 per-truck. One truck content, consisting of five cubes, can be completed within one week. After being split into 50 carts, it is sold for IDR 10,000 or $ 0.71 per-cart. Therefore, one truck's sale becomes IDR 500.000 or $35.46, with a profit of IDR 300,000 or $21.27.

Mrs. MN's narrative indicates that, in terms of income, the third type is slightly more profitable than the first and second, with an average of IDR 1.2 million or $85.10 per month. Other informants of the third type provided information similar to the average amount stated by Mrs. MN.

The description presented by some of the stone-breaking informants above is an overview of women's income as stone breakers, without analysing the overall family wage. The activities performed by stone-breaking women in North Moramo are due to the less profitable economic condition of their families.

The work of stone-breaking women in North Moramo is very diverse. Some work as fishermen, gardeners, building labourers, *paulaula* (those that lift the splintered stone to a truck), as well as stone breakers. Some perform more than one type of work, such as fishermen and builders or stone breakers. Their husbands' income tends to vary monthly, although it is generally considered low due to their inability to provide the family's basic needs adequately. Therefore, one of the main reasons why women work as stone breakers is to help their husbands provide the basic needs of the family.

NLN (34 years old) stated that her husband as a *paulaula* earns a salary of IDR 60,000 or $4.25 per-truck; therefore, when three people transport the stones, the wages of each equal IDR 20,000 or $ 1.42. This work is not continuous and depends on the order; hence it is difficult to calculate the actual monthly income. The information about the income of NLN's husband shows that when stones are transported in a truck three times per day, a wage of IDR 60,000 or $4.25 is obtained and when calculated monthly, a profit of IDR 1.8 million or $127.66 is earned. However, this income is still very minimal compared to the price of basic needs for one family. A stone breaker that earns IDR 250,000 or $ 17.73 per-truck can earn IDR 1 million or $ 70.92 monthly. Therefore, the cumulative family income becomes IDR 2.8 million or $198.58.

Another stone breaker named HLTN (27 years old) stated that her husband as a fisherman earns an average income of IDR 60,000 or $4.25 from each 2kg of fish sold. The amount was inadequate to meet the needs of a family with two young children. The first child was already in school (9.5 years), and the second was only a 1-year-old child. Therefore, HLTN's husband had to indulge in breaking rocks to support the family. However, the small income prevented them from acquiring higher economic assets.

Fishers are generally associated with poverty because the majority rely solely on simple equipment due to their lack of capital (Béné, 2003). Furthermore, they also experience poor catches due to the sea's erratic activity, which is dependent on the weather. In practice, fishing activities can only be carried out for 17–20 days monthly. The remaining days are associated with the time when the tide and wind are strong, thereby preventing them from carrying out sea-related activities. Similarly, during the occurrence of a new moon, the amount of fish captured is usually lower than usual. Therefore, these conditions make the income from fishing lower than that from breaking stones, thereby providing fishermen with a dual means of livelihood. In addition to working as a fisherman, they can also work as gardeners, paulaula, or building workers. This work diversification is a poor household strategy used to overcome the unprofitable economy for survival (Gautam & Andersen, 2016).

One of the stone-breaking women, named WND (66 years old), whose husband is a gardener, stated that the average income from the proceeds of banana, coconut, and vegetable sales is IDR 50.000 or $3.55 per day. Gardening in this context is a traditional process using simple equipment and processing systems that rely solely on energy.

The description of husbands' income above, both as fishermen, garden farmers, construction workers, and *paulaula* is a picture of wages based on rupiah earned and not based on economic concepts that consider various aspects to calculate profits. For example, this assessment does not consider such production facilities and infrastructure aspects, as boats, nets, trawlers (fishermen), hoe, crowbar, the cost of fencing, seeds (gardens), martyrs, gloves, and hats (*paulaula* and stone breaker). Furthermore, physically hard work implies the presence of energy resources covered by food, beverages, and cigarettes. Therefore, when all these aspects are taken into account, the income becomes much lower.

The data related to the family income of stone-breaking women is still minimal, since many of them keep no record of monthly revenues. Those with accurate records of income and monthly expenses are likely to hide them. However, the collected data can serve as an indicator for determining the relative socio-economic position of stone-breaking women in their families.

A diversity of information on the contribution of husbands and wives into the family income shows that women play a very significant role in supporting their families' needs. As a case in point, in NLN's family, 36% of the income was used to meet the basic requirements. These findings agree with the research carried out by (Stier & Mandel, 2009), which stated that working women increase the contribution relative to household income. When women rely solely on their husbands' income

as the head of the family, there is a significant probability that some basic family needs cannot be fulfilled. This is because this income only serves to maintain the survival of the family.

Significant economic contributions to fulfil the family's basic needs are the main factors that lead housewives into working as stone breakers, despite the difficulties associated with the job. The money gathered in small quantities through this activity is used to sustain the family's basic needs. This undermines the common assumption that women are gentle creatures who are capable of carrying out less strenuous jobs. Poverty has changed the viewpoint on stone-breaking work based on gender.

Conclusion

The time allocated by women to breaking stones to make a living and take care of their family is more significant than their husbands' due to their multiple roles in working and taking care of the family. Due to the assistance rendered by housewives, the incomes of stone-breaking families have increased. This fact shows that the economic contribution of stone-breaking women (wives) in the family is very significant in meeting their basic needs. Therefore, women need to assist their husbands in order to have enough savings. Although this does not improve living standards, however, the economic contribution is the main reason why women remain stone breakers. Therefore, it is necessary to build the same perception of gender justice between husband and wife, especially regarding time and workload distribution.

Stone-breaking women are categorized as economically disadvantaged social groups struggling to ensure the survival of the family. Poverty has changed the way women think regarding the division of work by gender. The phenomenon of stone-breaking women is due to the poor's work culture; therefore, it becomes intergenerational in the long run. Stone-breaking women's phenomena happens because there has been no specific government policy to raise this social group's standard of living until recently. Therefore, there is a need for a stone-breaking women empowerment programme that would cover the social, educational, economic, and political dimensions.

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ARTICLE

Vandal Practices as a Psychological Response to the COVID-19 Pandemic

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ABSTRACT

Vandalism can be seen as a form of individual self-realization and expression of the individual and collective responses to change. In this paper, we intend to look at the meaning and motivations behind acts of vandalism. We also aim to classify cases of vandalism that occurred during the COVID-19 pandemic. In total, we analyzed 80 cases of vandalism related to the COVID-19. The information was obtained from open online sources: publications in online communities and media found through the use of hashtags #COVID-19 and #vandalism. As a result, five categories of vandalism were identified: (a) vandalism as a mechanism of adaptation to change; (b) vandalism as a coping strategy; (c) vandalism as an unconscious defensive reaction to a threatening situation; (d) vandalism as resistance to change; and (e) vandalism as a reflection of the sense of social injustice. We found that vandalism during the pandemic was used mostly as a way of adaptation to change and as a coping strategy. Moreover, our findings have also demonstrated that social instability and transitivity in the crisis period stimulate people to rethink the current social order and search for new social forms, structures, and principles.

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vandalism, destructive behavior, COVID-19, street art, social reaction

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Introduction

Vandalism is a complex social phenomenon. In urban spaces, vandalism is often a practice of direct or figurative communication that reflects current social processes. Both vandal acts and social manifestations arising around vandal activities express the needs and moods of some social groups or society in general. Vandalism generates messages which create significant effects and has a considerable influence not only on the communications within subcultural communities (Kuzovenkova, 2019) but also with the significant stakeholders in the public space: government agencies, opinion leaders and urban dwellers. However, vandal practices can also contribute to a person's inner work enabling him or her to cope with the pandemic-related stress (Kruzhkova et. al., 2018).

During the COVID-19 pandemic, which hit most countries at the beginning of 2020, vandal manifestations reflected the perception of this global problem by individuals, groups, and society. Interestingly, COVID-related vandal manifestations are different in their content and character, as they address multiple socio-psychological aspects of the changes and problems on the individual and collective levels.

Social changes and reactions related to the COVID-19 pandemic are unprecedented (Hodgkinson & Andresen, 2020). This situation has significantly affected the social structure of communities, the quality of life, and the psychological state of most people. Recent research in the USA, Italy, China, Pakistan, Israel, Russia, and other countries show that coronavirus has immersed many people in anxiety and fear (American Psychiatric Assosiation, 2020; Balkhi et al., 2020; Führer et al., 2020; Kasyanov et al., 2020; Luo et al., 2020; Rossi et al., 2020; Somma et al., 2020; Tzur Bitan et al., 2020). These sentiments are reflected in certain behavioral markers: unwillingness to stay at home, absenteeism, buying more food than usual (Balkhi et al., 2020), buying weapons, domestic violence, irrational behavior, and escaping from quarantined communities (Galea et al., 2020). Such manifestations of acute and post-traumatic stress are a sign of a crisis associated with the violation of the psychological boundaries of personal space and the violation of the personal social life through the changing the very principles of human interaction with the outside world (Grishina, 2020, p. 1). The negative psychological effects of quarantine and self-isolation can be vast, significant and lasting (Brooks et al., 2020).

The imposed regime of social isolation and norms of social distance significantly limited the ability of people to communicate (Mosolov, 2020) and transferred all personal and business communications into a virtual format. At the same time, in this period, people experienced a growing need for communication compared to the pre-crisis 2019 year as they sought to gain a psychological "foothold" by engaging in social interactions and providing mutual support (Grishina, 2020). In the situation of high uncertainty, everyone chooses their destiny and decides what the task is: to survive, continue to function, change something or change them (Bazarov, 2020, p. 1).

On the one hand, quarantine restrictions impeded social activity, including crime. According to M. Eisner and A. Nivette, self-isolation and other restrictions preventing the spread of the COVID-19 changed the routines and usual patterns of behavior that led to the transformation of people's emotional states and, therefore, could sufficiently influence the crime rate (Eisner & Nivette, 2020). For instance, crimes related to vandalism in Sweden from mid-March to early May 2020 decreased by about 5% compared with the beginning of 2020 and the same period in 2019 (Gerell et al., 2020). Similarly, in Los Angeles, USA, the crime rate sufficiently decreased from the end of March to the end of April mainly because of the decrease in the traffic and mobility of residents. At the same time, vandalism in Indianapolis remained unchanged during this period (Mohler et al., 2020).

On the other hand, any restrictions often cause social resistance and unrest. The feeling of helplessness makes people desperate and forces them to seek solutions at any cost. A Chinese study showed that the COVID-19 pandemic both exacerbated the preexisting social inequality and also created new forms of social inequality (Qian & Fan, 2020). These consequences undermine the economic and social well-being of citizens and widen the gap between social groups, which increases social tension and may lead to protests and vandal actions. Thus, in May-June 2020, we could observe protest actions against racism in the USA and European countries, which resulted in the destruction and desecration of monuments to historical figures. Unauthorized street art objects and graffiti reflecting COVID-related problems appeared in the same period.

Restricted communications and limitations on the usual ways of self-realization turned vandalism into a "hyped-up" practice. Vandalism is an easily accessible medium of expressing one's own position or the position of one's group. It has a "ritual" character of conveying meaning through images or actions. A long period of complete uncertainty resulted in escalating social contradictions, increasing the level of anxiety and risks of social explosions. The lack of comprehensive information about the threat and the ways of ensuring maximum security results in a person's maladaptation to the new conditions, which often leads to a rise in magical thinking and conspiracy theories, for example, the use of "coronavirus mantras", or deliberately risky actions of ineffective symbolization (Žižek, 2020) and primitive forms of behavior. The latter stem from what Agamben calls bare life: reduction of behavior to the realization of the simplest basic needs, when people "are disposed to sacrifice practically everything—the normal conditions of life, social relationships, work, even friendships, affections, and religious and political convictions—to the danger of getting sick. Bare life—and the danger of losing it—is not something that unites people, but blinds and separates

them" (Agamben, 2020). In most cases, people don't tend to reflect much on their own reactions. Thus, vandalism as a projective practice has a large diagnostic potential in assessing the hidden intentions of individual and public consciousness.

In this research, we consider vandalism as a form of an individual's impact on the objects of the urban environment by changing the current state of these objects without the appropriate sanctions from the party that has legal rights to these objects (its owner or manager) (Kruzhkova et al., 2018). Vandalism can target different objects of the urban environment and it can take different forms such as changes of the existing objects or their destruction, creation of new objects. The degree of influence as well as the techniques and tools employed for this purpose can be varied. Vandal actions can have different consequences on the functional and aesthetic levels. Our understanding of vandalism encompasses the following aspects defined by Vorobyeva and Kruzhkova (2015):

- Vandals target someone else's property, which may be seen as valuable by others but not by vandals themselves;
- Vandals violate the laws or socially accepted norms of behavior and thus can be held legally accountable for their actions;
- Vandals damage someone else's property, changing its appearance or bringing it into complete or partial disrepair;
- Through acts of vandalism, vandals experience vivid emotions and adrenaline rush;
- Vandals seek self-affirmation—assertion of their own power over the surrounding reality;
- Vandals' actions are premeditated.

Our research purpose was to classify vandal practices as responses of individuals, groups, and society to the global threat caused by the COVID-19 pandemic. To this end, we addressed the following research questions:

1) How did the acts of vandalism reflect social reactions to the COVID-19 threat, pandemic measures, and their consequences?
2) How can COVID-related vandal actions be classified according to their socio-psychological content and character?

Methods

In the socio-psychological context, we investigated vandalism as a form of activity and behavior which expands the boundaries of the individual self-realization beyond the formally established social limits (Kruzhkova et al., 2018). Unfortunately, we have not found in the research literature any psychological classification of the actions of this type. To develop our own classification, we considered the motivation-based classification of vandalism (Callinan, 2002; Canter, 1980; Craw et al., 2006; Levy-Leboyer, 1984; Weinmayer, 1969; Zeisel, 1977), and the classification of vandalism by location, meaning, purpose, way of execution, design, etc. (Babikova et al., 2019; Kruzhkova et al., 2018). Nevertheless, the existing typologies and classifications

only partially meet the aim of this study, since they do not take into account the impact of crisis situations such as pandemics or other global threats. Therefore, to develop our classification of COVID-related vandalism, we also considered the classifications of coping strategies (Bobocel, 2013; Khazova, 2012; Kriukova, 2008; Lazarus & Folkman, 1984; Vaillant, 1977), types of personal psychological defenses (Conte et al., 2004; Cramer, 1991; Freud, 1936/1992; Plutchik et al., 1979), and types of collective psychological defenses (Stroh, 2007). We also used our previous studies where the forms of vandal behavior are analyzed in connection with defensive and coping behavior of young adults (Vorobyeva et al, 2016).

Materials

The data were collected from open Internet sources: media publications covering vandal acts related to the COVID-2019 pandemic with hashtags #COVID-19 and #vandalism. 68% of cases contained a direct reference to the COVID-19 and the other 33% appealed to (or were inspired by) the pandemic indirectly. The data and the results of their analysis in Microsoft Excel format are available at Mendeley data service (Kruzhkova et al., 2020).

We considered not only the cases of destruction or desecration of valuable material objects but also illegal graffiti and street art objects. 66% of the cases could be described as art, while the rest were purely destructive actions. The material for this study was selected according to the approach described in (Pavlov, 2014), where vandalism is understood as acts of changing a certain object of property without obtaining its owner's approval first. According to the 2017–2018 study (interviews, focus groups, monitoring of discussions on social networks, polls) in Russia, a significant part of the respondents includes both vulgar and artistic acts and artifacts into the category of vandalism (Rudenkin et al., 2018). Moreover, according to Simonova (2021), who conducted interviews with graffitters and street artists and monitored their online communities, they often describe their work as vandalism (Simonova, 2021).

Covering a broader and more diverse repertoire of uncoordinated acts of urban change has proven to be productive. As will be shown below, our strategy turned out to be a viable one: all the five types of reactions that we have identified contain both destructive and artistic cases of vandalism and are equally interesting for analyzing the psychological reactions of people to the pandemic.

The fact that 86% of analyzed cases received wide public approval and support in social networks indicates the sufficient potential of these data for reflecting not only individual and collective reactions to the pandemic but also overall social reactions.

Procedure

We analyzed 80 cases of vandal actions in relation to significant socio-psychological reactions and themes (markers): aggression, sarcasm, humor, hope, support of the new norms and requirements, protest, the perception of the novel coronavirus as a threat, fear or anxiety, positive assessment of the situation, pessimism.

We distinguished 5 categories of vandalism, each with its own specific combination of markers.

Table 1
Categories of Vandalism and Their Markers

Markers of vandal actions	Adaptation to change	Coping with a threatening situation	Unconscious defensive reaction to a threatening situation	Resistance to change	Depiction of social injustice
Aggression		+	+		+
Sarcasm				+	
Humor	+	+			+
Hope		+			
Support for new norms and requirements	+			–	–
Protest	–		+	+	+
Indication of danger		+	+		
Fear/anxiety		+	+		
Positive assessment of the situation	+			–	–
Pessimism					+

In the analytical data table, in each cell we marked "marker present" or "no marker" (Kruzhkova et al., 2020). Then we calculated the coefficient of belonging the particular vandal action (x) to the particular (n) category of vandalism (one of the five categories indicated in Table 1) according to the formula:

$$K_{xn} = \frac{\sum M_{xn}}{Q_{Mn}},$$

where K_{xn} is the coefficient of belonging calculated by dividing the sum of the markers detected in a particular vandal action (M_{xn}) by the total quantity of this category's markers (Q_{Mn}) (Kruzhkova et al., 2020). Thus, the coefficient may vary from 0 to 1. The belonging of each vandal action was examined in relation to each category. Then the assignment of particular act of vandalism to a particular category was determined by selecting the highest coefficient of belonging.

Results

We analyzed secondary sources (media publications, pictures, thematic social groups) and identified different socio-psychological messages conveyed by vandal actions, which led us to classify them into five categories:

1. *Vandalism as a mechanism of adaptation to change*. This category includes cases of unauthorized transformation of urban space aimed at reflecting new norms of social behavior. Sometimes a humorous component was used by the vandals to approve and consolidate new imposed social norms. At the same time, humor reduces the significance of these norms. However, their partial depreciation reduces the resistance to changes and encourages the adoption of the new rules of the game. Through vandal images and manifestations people can gain a better understanding of the threat they are facing and come to accept the fact of change. These images show

that the vandals are aware of this change and, through their actions, seek to reflect the new problems, practices, and life realities, and to rethink the existing values in the new context. They also seek to tell not only "social stories" but their own personal "stories".

The street-art work *Profilaktika* [Profilaxy] in St. Petersburg (Figure 1) represents an old TV showing only the typical TV test patterns with color bars. The picture depicts the world in a "special mode of functioning" with all its social and business activities temporarily frozen.

An interesting piece of street-art appeared in the Russian town of Bologoe: a famous adventurer and treasure hunter, Indiana Jones, finds the most valuable artifact of the pandemic time—a golden toilet paper roll (Figure 2). The idea of toilet paper as a treasure was also reflected in street art in other countries. For example, in Berlin, Germany, there is a drawing of Gollum saying "My precious!" to the toilet paper roll. The global hype around toilet paper, though hilarious, demonstrates a serious change

Figure 1

Graffiti Profilaktika [Profilaxy], Saint Petersburg, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_629447).

Figure 2

Graffiti Indiana Dzhons i zolotoi rulon [Indiana Jones and the Golden Roll], Bologoe, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_618809).

in the system of social values: simple household items, essentials began to be valued above the rest. The choice of the essentials to be portrayed differs depending on the national context: for example, in Russian cities there were drawings dedicated to buckwheat, which reflect an increased demand for this product in Russia and transmit a message similar to that of the drawings with toilet paper.

Many objects of vandalism reflected personal experiences and particular life problems that people faced during the pandemic. For instance, the cancellation of proms became one of the greatest disappointments for many 2020 graduates. The inscription in Figure 3 imitates traditional chalk drawings in the schoolyards devoted to saying goodbye to school life and reflects the changes brought by the situation of the pandemic.

The social isolation regime increased the risk of loneliness for many people: for instance, the image of the COVID-19 molecule quoting a well-known song (lyrics of Marina Tsvetaeva) about unrequited love *Mne nravitsia, chto vy bol'ny ne mnoi* [I like that you are not sick with me] (Figure 4) in a mildly ironic manner highlights the autonomy, atomization and loneliness of people during the lockdown. At the same time, this drawing emphasizes the need to keep social distance to stay safe.

The theme of love is often found in murals in different countries. For example, a mural in Brin (Norway) shows that the passion of lovers does not prevent them from wearing masks. A mural in Seattle (USA) claims that love is possible even in a gas mask (Figure 5).

The images we analyzed revealed an increased attention to the mask regime. Practically all over the world, unknown people put on hygiene masks on street sculptures. Both old and new murals spotted this modern "accessory". Masks added to the murals and street art reproducing famous masterpieces stimulated the viewers to rethink the "new classic" of the modern world. For example, street artist Banksy "put" a mask on the "Girl with the Pearl Earring" (Figure 6).

Figure 3

Inscription, Klintsy, Russia, 2020

Note. From *Ushli ne poproshchavshis'. Koronnyi vypusk* [Gone without saying goodbye. Corona graduates], BryanskNovosti (https://bryansknovosti.ru/ушли-не-попрощавшись-коронный-вы/).

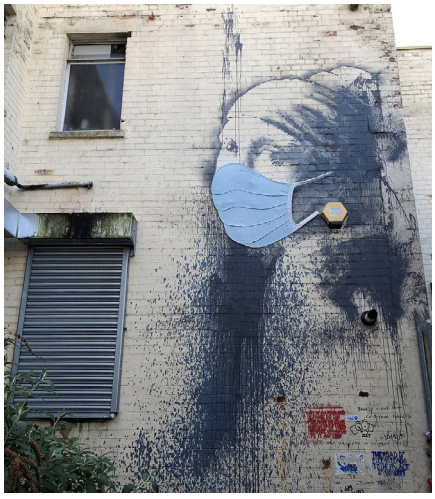
Figure 4
Graffiti Mne nravitsia, chto vy bol'ny ne mnoi [I like that you are not sick with me], Perm, Russia 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_652479).

Figure 5
Mural "Pandemic kiss in gas masks", Seattle, USA, 2020

Note. From *Iskusstvo i koronavirus: 25 muralov iz raznykh stran* [Art and coronavirus: 25 murals from different countries], Interior+Design (https://www.interior.ru/art/9380-iskusstvo-i-koronavirus-25-muralov-iz-raznih-stran.html).

Figure 6
Mural "Girl with the earring", Bristol, Great Britain, 2020



Note. From *Iskusstvo i koronavirus: 25 muralov iz raznykh stran* [Art and coronavirus: 25 murals from different countries], Interior+Design (https://www.interior.ru/art/9380-iskusstvo-i-koronavirus-25-muralov-iz-raznih-stran.html).

2. *Vandalism as a coping strategy*. Vandal paintings of this category use humorous techniques to depreciate the threat. At the same time, they are aimed at highlighting certain aspects of the negative situation and/or pointing to the ways of coping with them. These vandal practices use animation, personification of the threat, and insults addressed at the threat. They may pretend to be performing a kind of 'COVID-19 exorcism'. An example of the murals in this category may be those portraying political leaders in the form of the COVID-19 molecule (e.g., Donald Trump's face painted as the coronavirus in Copenhagen [Denmark]). (Figure 7).

In different cities of Russia, one can find graffiti containing obscene language and referring directly to COVID-19, demanding it to leave. The expulsion and symbolic destruction of the enemy is an important act, indicating a coping function (Figure 8). An example of such symbolic action can be found in Harold Parker State Forest, USA, where the sign of COVID-19 was just crossed-out on a cut of a tree stump.

Everybody faces the threat of falling victim to the novel coronavirus. The fear that the virus can appear in your home, in your family is great. The vandal shows an attempt of a virus to penetrate the citizen's apartment in the way similar to burglars but the man in the drawing protects himself with a mask and stays at home (Figure 9).

Another image contains a call to wash hands ('Wash your hands') to prevent the spread of infection (Figure 10).

The feeling of hope becomes central to the public sentiment—a hope that one will not get infected or die, a hope for recovery, a hope that one's loved ones will stay safe, a hope that the crisis will end. This situation was reflected in a mural in

Figure 7

Mural, Copenhagen, Denmark, 2020

Note. From *Iskusstvo i koronavirus: 25 muralov iz raznykh stran* [Art and coronavirus: 25 murals from different countries], Interior+Design (https://www.interior.ru/art/9380-iskusstvo-i-koronavirus-25-muralov-iz-raznih-stran.html).

Figure 8

Graffiti "2020 vs COVID-19", Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], Facebook (https://www.facebook.com/co.vandalism/photos/a.899434856812041/3008768082545364/).

Los Angeles, USA, which says 'Cancel plans. Not humanity'. In this mural, a woman is depicted putting the symbol of hope in her inner pockets along with a prayer and a smartphone (Figure 11). The painting demonstrates the main resources for coping with the threat and also shows that the hope for the best implies changing plans and switching to remote modes of communication.

Figure 9

Paint on the door "I know you're at home!" Haifa, Israel

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_632894).

Figure 10

Inscription Moi ruki. Tvoi novyi mir [Wash your hands. Your new world], Kazan, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_678161).

Figure 11

Mural "Cancel plans. Not humanity", Los Angeles, USA, 2020

Note. From *Iskusstvo i koronavirus: 25 muralov iz raznykh stran* [Art and coronavirus: 25 murals from different countries], Interior+Design (https://www.interior.ru/art/9380-iskusstvo-i-koronavirus-25-muralov-iz-raznih-stran.html).

The next form of coping in vandal practices is constructive participation in the fight against the virus and manifestation of public concern. These vandal objects contain simple encouragements and advice. For example, fans of Spartak football team created a graffiti with the slogan *Boris' i pobezhdai!* [Fight and win!] under the windows of the coronavirus hospital in Kommunarka, Russia (Figure 12). They also drew a wrestler wearing a mask and holding a piece of soap clamped in a raised hand calling for action. All over the world many graffiti and murals dedicated to health care depicted doctors as superheroes and symbolically showing that their work is heroic work. Their great contribution to fighting with the virus is emphasized. These pictures became widespread both among illegal (vandal) performers and legal (coordinated) street artists (Iskusstvo i koronavirus, 2020). In this way, they remind of the importance of highly qualified medical care for COVID-19 patients and demonstrate public support to health care practitioners.

3. *Vandalism as an unconscious defensive reaction to a threatening situation*. In this case, vandalism implies active resistance to the new requirements and standards. Such actions demonstrate the vandals' failure to cope with the fear of the COVID-19 spread. Their aggression stems from primitive magical thinking and irrational beliefs as real problem solving is substituted by destructive actions.

Destroying cell towers is an illustrative example of this category of vandal actions. In the suburbs of Liverpool and in eastern England, vandals damaged at least 20 5G cell towers, suspecting that the novel coronavirus could spread through them. It can be assumed that the towers became an object of vandalism because people confuse the fear of diseases with the fear of new technologies which are sophisticated and hard to understand (Golby, 2020).

In early May 2020, a cell tower was burned near the village of Nogir in the Republic of North Ossetia (Russia) because the residents were scared that a new fifth-generation network (5G) would be built. The head of the region, Vyacheslav Bitarov, noted that many residents of the republic claimed that the coronavirus infection did not exist and it was invented for further spread of 5G networks used for irradiation and chipping (V Severnoi Osetii, 2020). Similar incidents happened in New Zealand, where 17 cell towers had been broken since the beginning of quarantine in the country (Pasley, 2020).

Figure 12

Mural Boris' i pobezhdai! [Fight and win!], Kommunarka, Russia, 2020

Note. From *Fanaty «Spartaka» narisovali graffiti v podderzhku bol'nykh koronavirusom v Kommunarke: «Boris' i pobezhdai!»* [Fans of "Spartacus" painted graffiti in support of patients with coronavirus in Kommunarka: "Fight and win!"], Sports.ru (https://www.sports.ru/football/1084529039.html).

4. *Vandalism as resistance to changes*. For instance, in Kiev, Ukraine, in March 2020, a man who tried to enter a trolleybus without a medical mask damaged the doors after the ensuing conflict with the driver (Muzhchina razgromil, 2020).

The problem of self-isolation, which was central to most people during the pandemic, led to a large number of vandalism episodes devoted to this topic. A lot of graffiti dedicated to violation of the self-isolation regime appeared in cities, for example, Figure 13.

An interesting example of this type of vandal graffiti appeared in Moscow on April 1 (April Fool's Day): it depicts a pass written in the name of a certain person, allowing him to leave the house to draw these graffiti (Figure 14). It got more than 2,500 likes from the subscribers of the *Kontseptual'nyi vandalizm* [Conceptual Vandalism] Community.

Figure 13

Graffiti K chertu vashu izoliatsiiu! [Damn your isolation!], Yekaterinodar, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_678809).

Figure 14

"Graffiti pass", Moscow, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_626895).

In April 2020, in Yekaterinburg, a tantamoresca depicting a dog on a leash appeared (Figure 15) accompanied by a sign saying: Stand here and take a picture. Keep walking. If you meet a police officer, say that you are looking for your dog, which you have just gone outside with. Show them a fresh photo. Repeat each walk. The object "plays" with the rule prohibiting walks except for walking the dog. The ban on walks was especially difficult for citizens to put up with. The image received more than 1,500 likes from the subscribers of the *Kontseptual'nyi vandalizm* Community.

5. *Vandalism as a reflection of the sense of social injustice*. During the pandemic, a lot of pictures reflecting the growing social pessimism and social injustice appeared. COVID-related vandal actions reflected not only the situation associated with the pandemic itself but also the general crisis. The deep social problems were reconsidered in the context of the pandemic. For example, in Samara, Russia, the street art entitled Annigiliatsia [Annihilation] created by A. Abstraktov on a shabby hut depicts not only the coronavirus crisis but also the crisis of the urban environment, which is "dying" as historical buildings are destroyed and the city authorities keeping a closed eye on the roots of vandal youth practices. This drawing was also a reaction to graffiti being likened to the coronavirus by the head of the communal services and to the persecution of street artists (Figure 16).

The *#Malen'kieludi* [#Smallpeople] art street project in Russia focused on the concept of social distance (Figure 17). The author showed how far people are from each other in many social contexts: The imposed physical social distance of 1.5 m is not as terrible as the social distance between those who work and those who have lost their jobs.

In many Russian cities, street art links the coronavirus crisis with the general spiritual crisis, implying that people are becoming more prone to mass panic and susceptible to mob mentality. The mural on the wall of the Church of the Annunciation of the Blessed Virgin Mary in St. Petersburg (V Peterburge zaderzhali, 2020) compared the coronavirus and the "new Jesus".

Figure 15

Tantamoresca with a fake dog, Yekaterinburg, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_635638).

Figure 16

Inscription Annigiliatsiia [Annihilation], Samara, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_652518).

Figure 17

Project #Malen'kieliudi [#Smallpeople]. Sotsial'naia distantsiia [Social Distance], Russia, 2020

Note. From *#Malen'kieliudi* [#Smallpeople], VK (https://vk.com/malenkielydi?z=photo-127054882_457239759).

The theme of religion was also raised in several vandal graffiti located near Orthodox churches. Masked Jesus appeared in several cities of Russia, indicating the need to comply with the rules of social isolation and adherence to the mask regime not only in secular spaces but also in the church since such rules are equally important for everyone (Figure 18). Such image appeared near the Orthodox Church in Chelyabinsk. Its appearance was preceded by an online discussion regarding the introduction of fines for violation of the lockdown regime. Many citizens considered it unfair that the work of most institutions was suspended while churches continued their services without any limitations.

In St. Petersburg, a street art artist replayed the situation of drug sales through graffiti: a man in a protective medical suit writes an announcement about the illegal sale of a coronavirus vaccine. This drawing contributes to the reconsideration of the existing social problem of the widespread sales of prohibited substances and the new problem of the increasing fraudulent sales of "miraculous" antivirus drugs (Figure 19). Moreover, it raises the problems of legal acquisition of some foreign drugs and their high prices.

Figure 18

Graffiti "Masked Jesus", Chelyabinsk, Russia, 2020

Note. From *Kontseptual'nyi vandalizm* [Conceptual Vandalism], VK (https://vk.com/wall-86640238_634723).

Figure 19

Graffiti Vaktsuna ot Kovid-19: 100% import, dorogo [Vaccine from COVID-19, 100% Import, Expensive], St. Petersburg, Russia, 2020

Note. From *Koronavirus v Peterburge: poslednie novosti na segodnia* [Coronavirus in St. Petersburg: the latest news for today], Fontanka (https://www.fontanka.ru/2020/06/05/69299335/).

Discussion

The pandemic is a completely new situation for most modern people, which provokes a strong emotional response both at the individual and collective levels. It is the novelty of the situation, the lack of effective, proven strategies for individual and group behavior, and the situation of uncertainty that makes people, on the one hand, make a conscious effort to accept the new conditions and adapt to the situation (including doing so collectively in reference groups), on the other hand, it triggers the work of the mechanisms of the collective unconscious. Analysis of vandal practices as a reaction of people, groups, and society to the COVID-19 pandemic provides some insights into the social reaction to the COVID-19 and the corresponding adaptation mechanisms.

Most vandal actions in our sample (30 out of 80 or 38%) belong to the first category of vandalism (adaptation to change); the second category (vandalism as a way of coping with the threatening situation) had approximately the same share of cases, 31%. The first and second categories are related to rational coping strategies or 'constructive' and 'useful' vandalism. According to D. Peyrat-Apicella and S. Gautier, constructive coping strategies in stressful situations force people to look for solutions at all costs, to develop unified solidarity, to eliminate gilt and overwhelming passivity to decrease anxiety and stress. These coping strategies are supported by a certain inner conviction: If I act, I will not be sick (Peyrat-Apicella & Gautier, 2020, p. 12).

The use of humor enhances the effect of constructive coping, reducing the level of stress and anxiety (Penson et al., 2005; Savitsky et al., 2020). Self-sustaining humor is closely linked to constructive coping strategies: seeking social support, positive reassessment, looking for a solution to the problem, maintaining self-control, and accepting responsibility (Khazova, 2012). In a situation of a common threat and high uncertainty, these coping strategies help people maintain the level of social and socio-psychological activity necessary for developing new rational behavior patterns and new models of social interaction. This is especially important for decreasing the uncertainty caused by the inability to use the usual ways to achieve the necessary and desired results (Likhacheva, 2010). As the borders were closing and the living space was narrowing, the levels of stress and frustration increased (Grishina, 2020). Vandalism has thus provided another way to show oneself and the world that public actions are still possible and that people have not lost their freedom—both the freedom of movement through urban space and the freedom of expression. In the situation of high uncertainty and common threat, even institutionalized forms of street art were marginalized, acquiring the features of vandal practices (the lack of coordination with city authorities, lack of permissions to print the images, etc.), since vandalism is more dynamic and reflective of the current agenda.

The third and fourth categories of vandalism (unconscious defensive reaction and resistance to change) included a significantly smaller share of analyzed cases: 4% and 3% respectively. They can be described as "protest vandalism" devaluing social change. They also imply rational rethinking of the new reality through meaningful

involvement with the "rebel" camp. "Rebels" express their denial of the new rules and prohibitions and even the terrifying reality itself through extreme destructive behavior including unauthorized walks and vandalism (Peyrat-Apicella & Gautier, 2020). Nevertheless, such behavior is underpinned by the irrational belief that there is no significant threat from the COVID-19 or that the real threat comes from completely different factors (for example, 5G cell towers). The pandemic situation gave rise to conspiracy theories based on the belief into the unnatural origin of the virus (Calisher et al., 2020; Somma et al., 2020) or its being no more than a cover for some other, hidden purposes. Conspiracy theories can also be seen as a form of a rational coping strategy used by a group to understand significant events and subsequent chaos or uncertainty (van Prooijen & Douglas, 2017). However, conspiracy theories are proliferating not only because of the need to cope with the trigger event itself but also because of other, more persistent factors such as economic crisis, political instability, etc. (Georgiou et al., 2020). Žižek notes that the pandemic has spawned a widespread epidemic of ideological viruses dormant in our society: fake news, paranormal conspiracy theories, outbursts of racism (Žižek, 2020). The dissemination of conspiracy theories and their support in social networks significantly enhances their attractiveness (Garrett, 2020). Thus, due to the absence of comprehensive information about the COVID-19 and the lack of trust in the official sources, the popularity of conspiracy theories supported by social nets grew considerably, which we noticed when analyzing the comments to the photos of COVID-related vandal actions.

Not all cases of vandalism that have occurred since the start of the COVID-19 pandemic were directly related to the current situation. Nevertheless, changes in the social living conditions, changes in the daily routines and lifestyle brought about by safety requirements destabilized the emotional background of social interactions. This, in its turn, triggered the splash of previously latent contradictions related to social inequality, racism, economic distress, political confrontation, etc., and, therefore, gave rise to different protest movements and manifestations of aggression, including vandalism all around the world. Such behavior can be provoked by the governments' attempts to enforce social control. American philosophers J. Flowers and H. De Cruz analyze the coronavirus crisis in the United States drawing on the classic ideas of J. Dewey and see the strengthening dynamics of "we are against them" supported by the political decision of the authorities to maintain a regime of bourgeois democracy, which can survive only if citizens are afraid of each other and divided, if they compete and do not cooperate (Flowers & De Cruz, 2020). Žižek, in turn, argues that the introduction of quarantine backfired and led to the ideological pressure to establish clear boundaries between the healthy and the sick, to isolate those who might pose a threat to an individual's identity (Žižek, 2020).

23% cases (18 out of 80) belong to the fifth category (resistance to change), which shows that the pandemic provoked the sensation of change in the locus of control, changed the rules of the game and thus contributed to the vandal activity not directly related to the new disease. Žižek aptly observes that the pandemic has given impetus to new forms of solidarity, and also demonstrated the need to control those in power, whose responsibility in the eyes of ordinary people started to grow: "You have power,

now show us what you are capable of!" (Žižek, 2020, p. 72). The analysis of the vandal actions that have occurred since February 2020 revealed a surge in the cases of World War II memorials being vandalized in different Russian cities: Moscow, Podolsk, Kaliningrad, St. Petersburg, Kronstadt, Nizhny Tagil, Artem and others. Vandals had picnics on war memorials (Dvukh muzhchin, 2020; V Primorskom krae, 2020), grilled kebabs on the Eternal Flame (Gotovivshii edu, 2020), and extinguished the Eternal Flame (Politsiia v Podmoskov'e, 2020). At the same time, those vandals who were caught and interrogated claimed that they did not feel hatred towards the veterans and respected war heroes (Gotovivshii edu, 2020). Through their behavior the vandals sought to express their rejection of the official discourse of which the Great Patriotic War memorials are seen as part of. Vandalism was made easy by the empty streets and squares where the memorials are located. While desecrating these sites, vandals challenge the establishment and subvert its official discourse.

The feeling of increased social transitivity fueled the numerous acts of vandalism in the United States and several European cities. The rapid changes (new social norms, rules, values, behavior patterns, etc.) together with the inability of the key political figures to solve COVID-19-related problems contributed to the impression that the established structures and hierarchies became weaker and created a feeling that a window of opportunity was opened for desired social shifts and restructuring of the social system. The possible directions of these shifts are described differently in the philosophical discourse, which in an abstract manner summarizes the strongest undertows of popular opinion. According to Vittorio Bufacchi, the pandemic brought humanity closer to the state that Hobbes in "Leviathan" calls the return to the natural state (Hobbesian state of nature). This state implies a constant fear of death as everyone is equalized in the face of danger at the fundamental level: people's financial status, gender, or race do not matter for the virus, and many aspects of cultural and social life (theatres, face-to-face communication, live events, etc.) recede to the background. Vittorio Bufacchi emphasizes that, as in the Hobbesian state of nature, the life in the COVID-19 era reminds of the emancipative policy of social cooperation and its huge potential: we are entering the territory of a new social contract, which will become the cornerstone of a new configuration of civil society (Bufacchi, 2020).

Žižek, despite the fact that he highlights the elitism of the possibilities of preserving the usual way of life, supports the idea of impending social changes. He also speaks of the prospects of cooperation and, despite the criticism, discusses the possibilities of the emergence of a new communism that overcomes the boundaries of national interests and raises the prestige of the local practitioner (Žižek, 2020). Agamben, on the other hand, speaks of the strengthening control through artificial support of panic. He points out that the pressure on basic needs has become a part of the norm. in order for total government control to become relevant and legitimate has become part of the norm. This pressure is aimed at making the government's total control appear both relevant and legitimate (Agamben, 2020).

In the situation of modern transitivity, the most interesting philosophical conceptions reflect such relevant problems as adaptation to the new conditions and the search for one's place in the changing world; ethical issues; change of the world

view; the choice of survival tools and the cost of these choices; loss of confidence in the established, official systems. The above-described philosophical interpretations are, in fact, the reflections of the different public moods during the pandemic in the ontological sense in which Heidegger (Heidegger, 1953/1997, 1927/2003) and Bibikhin (Bibikhin, 1989/2020) spoke about them. Moods become noticeable when they collide with other moods, through their mutual influence, they become more pronounced during the periods of change: Moods that form the non-objective "background" of life can themselves be shaded only against the background of other moods. Therefore, the correlation between the significance of the world and the mood is most noticeable when the mood or the significance of the world changes radically (Shkuratov, 2005).

Acts of vandalism—these uninvited changes of space, be it the destruction of a memorial or creation of a mural—express the mood of specific groups of people, as these vandal acts implicitly affect the mood of people not belonging to these groups. Collective sentiments, as it can be assumed, determine the types of vandalism. Mood—the feeling of oneself in the world, attunement to what this world represents for itself now, or the basic world view— determines the actions and emotions that will fill the lives of individuals and groups

It is important that the conditioning of vandal acts by mood, that is, that certain mood for seeing the world and feeling oneself in the world in a very specific way makes these practices extremely important for people who carry existential functions for them. Although from the standpoint of the research one can note the formal compliance of these actions with the criteria of vandalism, in the picture, in the mood for the world for these people, vandal actions are a necessity, part of the natural course of events, which makes the analysis of the assessment of such transitional states in the life of society through the analysis of vandalism liquid.

In the face of changes associated with the COVID-19, moods such as fear, horror, hope, boredom are manifested. According to Žižek, there is no longer the world around us, ready for us, waiting for us and looking at us (Žižek, 2020), a person must correspond to the environment differently, find a new position, then accept a new organization of communication with the world and adaptation to it (type 1 vandalism as an adaptation mechanism), and thus a new mood must be established. Fear as a fundamental category indicates an understanding of the boundaries of existence, clearly outlines the contours of what is worth fearing. Coping with fear, which reveals the fragility of the world that has changed so quickly, in which habitual orders and forms are destroyed, also affects self-attunement (type 2 vandalism as a coping strategy). Wild behavior corresponds to the feeling of oneself in the world that has become wild and where all the primitive means are now good and useful (type 3 vandalism as an unconscious defensive reaction to a threatening situation). Resistance to the moods of others, to the new images of the world and the new ways of interacting with it causes vandalism of resistance (type 4 vandalism as resistance to changes) and a reconsideration of compliance with established, official structure (Am I in accord with this world, with its hierarchy and institutional order? Is everything fair and working well? Can you stay in harmony with the environment?) (type 5 vandalism as a reflection of the sense of social injustice).

Conclusion

Vandalism as a socio-psychological phenomenon has existed throughout the whole history of human civilization. Nevertheless, vandal practices in the modern situation of social transitivity are performing specific functions both for individuals and groups. From the social perspective, vandalism has a diagnostic function as a marker of social problems and attitudes to them. The COVID-19 pandemic, being one of the greatest threats to human life and health, to economy, environment, social well-being, and political stability, was reflected in vandal actions, which expressed behavioral and emotional reactions to the current situation and changing reality. Thus, in a crisis, vandalism appears both as an effective instrument of reassessment of one's own and social capabilities and as an attempt to assert one's own place in the new world.

In this research, we identified five categories of vandalism: first, as a mechanism of adaptation to change; second, as a coping strategy; third, as an unconscious defensive reaction to a threatening situation; fourth, as resistance to change; and, fifth, as a reflection of the sense of social injustice. This new classification enriches previous studies on vandalism and opens new avenues for further research on the nature of vandalism in the pandemic era and, vice versa, on vandalism as an indicator of social tension and the prevailing public moods and sentiments.

The predominance of the first and second categories of vandalism in our sample expands the understanding of vandalism as a rational form of behavior, not only as an impulsive behavioral strategy. The sufficient number of cases of the fifth category indicates that vandalism is important as a marker of increasing social tension and also as a socio-psychological mechanism of reacting to crisis and stressful conditions. Our research findings have shown that social instability and transitivity during the crisis stimulate people to rethink the current social order and to search for new social forms, structures, and principles.

The broad social support for street art in social networks shows that such practices are considered as admissible in modern society. Our research opens up new prospects for monitoring public moods and sentiments in the times of crisis through semantic analysis of vandal actions and analysis of the motivations behind these actions. Our findings can be used for developing mental health and psycho-social support programs during the pandemic.

Limitations

The natural limitation of this study is related to the fact that the pandemic is still not over and can play out in 2021 and beyond. Depending on the changing life conditions and public sentiments, the features of vandal images may also change.

Due to the COVID-19-related regulations, we could not access the images and objects of vandalism directly and had to collect the empirical data by using the available Internet sources. As a result, we analyzed only the images and information that we found online.

The suggested classification should be supplemented with a more detailed study of the social-psychological aspect of vandalism not only in the pandemic, but also in other crisis situations and in the ordinary life. Moreover, since this research relies primarily on the information from Russian sources and online communities, it can be further expanded through the use of more diversified resources from different countries.

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ARTICLE

Informal Sperm Donation in Russia

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ABSTRACT

Rising infertility across the globe has created a growing demand for assisted reproductive technologies (ART). In recent years, apart from sperm donation in formal settings such as fertility clinics, informal donation practices have emerged and spread across Russia. These reproductive donation practices have become possible due to the development of social networks and private online platforms. We conducted a pilot study (eleven semi-structured interviews) of the informal sperm donation in Russia and analysed donor-recipient interactions, donors' expectations and experiences of finding recipients online. We focus on donors' motivations and on the meanings, which donors invest in this practice that consumes significant resources on their part (medical tests and artificial insemination costs, travel and accommodation expenses, sometimes mutually agreed financial support of future offspring). We interpreted the practices that coalesced around informal donation from the perspective of symbolic interactionism, because it allowed us to showcase how actors reflected on and formulated the meanings of their actions in the absence of externally imposed rules (legal regulations, established moral conventions). Since informal donation practices do not fit into the traditional schemes of interpretation, such research requires the actors involved in informal donation either to create their own schemes or to modify the existing conceptual frames in creative ways. The study shows that informal donors do not only provide their genetic material but also spend time and invested considerable resources to ensure their procreation, including eventual financial support of the child. At the same time, these men are not interested in marital relations or paternal relations with their offspring. Thus, the informal sperm donors do not associate the parental project with traditional family and its values. We conclude

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that ART engendered a new phenomenon, which might be described as extramarital reproduction. Assisted reproduction outside marriage gains footing in Russia and requires more detailed further study.

KEYWORDS
sperm donation, informal sperm donation, assisted reproductive technologies, extrafamilial reproduction, donor motivation, online platforms for reproduction

Introduction

Rising infertility across the globe has created a growing demand for assisted reproductive technologies (ART). According to the Russian Association of Human Reproduction (RAHR), about 12% of In vitro fertilization (IVF) cycles use donated material such as sperm, oocytes and embryos. Sperm donation is one of the most widely used and well-known assisted reproductive technology; it is also the least traumatizing for the donor. In the last decades, there has been an international trend towards open-identity gamete donation (sperm and oocytes), with the corresponding changes in legal regulations (Blyth & Frith, 2009). In Sweden, the UK and Netherlands, after coming of age, a donor-conceived child has the right to receive identifying information about the biological father. The requirement to disclose the information about the donor's identity has led some donors to seek greater discretion in informal settings. Apart from protecting donors' anonymity, informal settings open greater freedom to donors who might not be vetted for donation by fertility clinics.

In Canada, for example, even though the so-called home insemination is regulated by a number of legislative acts, there still remains enough room for legal ambiguities and complexities, resulting in lawsuits and litigations. The birth of a donor-conceived child does not imply any legal obligations on the part of the donor unless the sperm was donated through sexual intercourse. In this case, the donor is given a year after the child's birth to claim his parental rights (Kelly, 2009; Kelly, 2010).

Health Canada even published materials warning of the potential dangers of using sperm from online donors (Health Canada, 2011). The emergence of online platforms offering sperm donor matching services enables donors and recipients to dodge the rules of fertility clinics but raises a number of ethical and legal concerns (Ravelingien et al., 2016).

In Russia, according to the Order No. 803н *O poriadke ispol'zovaniia vspomogatel'nykh reproduktivnykh tekhnologii, protivopokazaniiakh i ogranicheniiakh k ikh primeneniiu* [On the procedure of the use of assisted reproduction technologies, contraindications and limitations of their application] issued by the Ministry of Health on July 31, 2020, men aged 18–35, physically and mentally healthy, have the right to be sperm donors after undergoing medical screening and genetic testing. Sperm donors can be anonymous as well as non-anonymous (O poriadke ispol'zovaniia, 2020). The Order came into force on 1 January 2021. To facilitate the procedure of donor selection, it is advised to compile a list of donors with the information about their

appearance (height, weight, eye colour, hair colour, etc.) and results of their medical and genetic tests, their race and nationality. The Order specifies that in any case, only the use of cryopreserved donated sperm is permitted after repeated negative results of the treponema pallidum antibody test, test for IgG and IgM antibodies to HIV-1 or HIV-2, and test for antibodies to hepatitis C and B virus (O poriadke ispol'zovaniia, 2020).

In recent years, apart from sperm donation in formal settings (in fertility clinics and similar institutions), informal donation practices have emerged and spread in Russia[1]. This phenomenon, however, remains largely underexplored in Russian research literature although in other countries the questions of online informal sperm donation have been in the focus of scholarly attention for quite a long time (see, for example, Ripper, 2008). In the last decade, this phenomenon was widely researched across different countries and contexts. A research team from the Netherlands created a taxonomy of reasons for sperm donation in formal and informal settings, comparing the possible reasons for and against sperm donation conducted via medical institutions or through direct donor-recipient contacts (Bossema et al., 2014). A large-scale British survey focused on men registered as sperm donors after donor anonymity was abolished in the UK (Freeman et al., 2016). A large Australian study of sperm donors identified the characteristics of donors that correlated with their willingness to act as donors in the context of identity-release legislation in Australia, Canada, the UK and USA (Riggs & Russell, 2011). Lavoie and his colleagues discuss the experience of Canadian donors offering their services online (Lavoie et al., 2018).

In this article, we are going to discuss the informal practices of online sperm donation in Russia, focusing on donors' perceptions of the process. The donors we interviewed treat this process with the utmost seriousness and invest into it a large amount of time and money: they study the medical and legal aspects of ARTs, undergo regular medical check-ups and screening tests, travel to other cities to meet potential recipients, create and maintain their own websites or groups in social media where they advertise their services and publish easy-to-understand materials on assisted reproduction.

In our study, we discuss different aspects of donor-recipient interactions, but we focus primarily on donors' motivations and their expectations concerning potential recipients as well as their evaluations of donor-recipient relationships. The article aims at shedding light on donors' motivations and the meanings that sperm donors ascribe to donation, given the fact that these donors invest significant time and resources in their activity.

Methodology

In our sampling and selection of informants, we focused on the outstanding group of individuals. After the quantitative survey of sperm donor motivations was completed online in October 2019 (Polyakova, 2020), a group of 24 men who reported uncommon donation practices were discovered. While having various social and

[1] These practices rely on online platforms such as http://donorspermi.ru/, https://mama-poisk.ru/, https://alldonors.ru/, https://rebenku.biz/.

demographic traits, these individuals showed greater involvement and expertise in reproductive donation. First, they were well informed about the details of ART procedures; they have passed all the necessary medical tests or were ready to renew them upon first request; they were registered under several nicknames or had their own websites/accounts in social media devoted to reproductive donation; they published online photographs of their children, parents and other kin; they preferred artificial insemination and IVF to conception via intercourse; they were willing to travel to other cities to meet the recipient woman and to cover all the expenses; they were ready to cover the expenses of the IVF procedure and to support the mother and future child financially.

These individuals were invited to participate in an in-depth interview. Some of these individuals declined the invitation or stopped responding in the course of preliminary negotiations and scheduling. Those who accepted the invitations were interviewed via Skype[2] (7), in person (2), and replied via emails (2).

The research on this topic in various countries, in one way or another, deals with the same set of questions: Who are sperm donors? What are their motivations for donating sperm and why do they choose to do it via the Internet? What method(s) of insemination do they prefer? How do they prepare for donation? What are their expectations regarding the contact with the recipients? How many of them have donated their sperm? Do they maintain contact with the recipients and resulting children? (Freeman et al., 2016).

The interview guide was designed in accordance with Jane Agee's recommendations (Agee, 2009): we started with the question types that she recommends, followed by additional questions that called for a more extended response with biographical details or a more detailed discussion of specific aspects. All responses have been anonymized and transcribed. We used categorization analysis to earmark and typologically distribute motives and practices of reproductive behaviour reported by the informants.

In total, we interviewed 11 men, aged 28–53 (mean age is 35.67). Only one respondent had no higher education (vocational secondary education), two respondents held two higher education diplomas and two other respondents held a degree above the bachelor level. Most respondents were from Moscow, others were from Ufa, Nizhny Novgorod, Krasnodar, Yekaterinburg and Chelyabinsk. As for the respondents' professional background, there was an electrician, a lawyer a medical practitioner, two R&D specialists, two IT specialists, two academic researchers, and two entrepreneurs. All respondents were heterosexual, four were officially married, seven had children born from a relationship. According to the respondents' own assessments, the majority were middle-income and only three had a high income.

Conceptually, out study relies on the symbolic interactionism theory, which allowed us to show how actors formulate and realize the meanings of their actions in the absence of external rules imposed on them by social institutions (Goffman,

[2] Skype is a registered trademark of the Microsoft group of companies.

1974). Since informal donation practices do not fit into the traditional schemes of interpretation, such research requires the actors involved in informal donation either to create their own schemes or to modify the existing conceptual frames in creative ways. We believe that the theoretical approach from the perspective of symbolic interactionism is the most productive in this respect, since it takes as a point of departure the fact that people relate to events depending on the meanings they ascribe to these events; that these meanings are generated in the process of communication and interactions between the actors involved; and that, nevertheless, these meanings depend on each actor's individual interpretations (see Lavoie et al., 2018; Poupart, 2011). In our case, communication between the actors—donors and recipients—takes place online and depends, on the one hand, on the motivations and life stories of the people involved in the process and, on the other hand, on their mutual expectations and the agreements they reach with each other.

While symbolic interactionism helped us on the microlevel, it was *The Transformation of Intimacy* by Anthony Giddens (1992) that was the most illuminating for interpreting the emergence of informal online sperm donation on the macrolevel. In his study of 1992, Giddens demonstrates that major social transformations including women's entry into the paid workforce and technological advances, such as effective contraception, gave women greater control of their lives and of their bodies. As a result, sexual relations were emancipated from the familial social control and the reproductive function within the family. Sex could be "pure" pleasure unburdened of risks of unplanned pregnancy and social opprobrium. On the other hand, late modern familial relations evolved into the search for strong emotional connection and sexual fulfillment ("pure relationships") rather than—as previously—being strongly dependent on material constraints and social expectations of formal marriage for any "mature" individual. With the development of ART and media communications in the last decades, human reproduction may, as we hypothesize, make another step in this process of functional differentiation in the intimate sphere: reproduction and child-rearing can become separate from both sexual and familial relations. We use the notion of extramarital reproduction to describe these new realities of seeking reproductive partners online and building certain relationships with the recipients and future offspring without entering into formal or informal marital relations with the reproductive partners.

Private Sperm Donors and the Internet

Most respondents answered the question why they decided to become online sperm donors by saying that it was fast, easy and cheap or, as one of the respondents put it, "you wouldn't expect me to place an ad in a newspaper, would you?" The respondents find it particularly important to be able to meet the mother of their future child: "I'd like to know in what conditions my child will be living in, whom he or she will look like, what he or she will wear—you can tell all this immediately just by looking at the woman". The majority of donors point out that they can stop online communication at any

moment if they choose to. It should be noted that four respondents have their own websites or have formed special groups online. The most interesting is the case of donor D., whose site, apart from his own photographs and a detailed description of the donor-recipient interaction procedure, includes photos of his parents and of over 20 children he fathered. The site also contains a section on embryos resulting from successful IVFs of different women and photos of these women. There are about 15 comments and responses from the women who used D.'s services and tips on the choice of a sperm donor, the information about IVF, the influence of genes on offspring and so on.

Despite such extensive coverage of his services and related aspects, D. admitted that sometimes he faces problems in his interactions with potential recipients: "Only one out of the thirty women who wrote to me was actually ready for IVF and ready to become a mother of my child, the rest just wasted my time", he says. Some donors mentioned that many women who register on such websites actually do not do it in good faith: "There are women and not just a few of them who are looking for husbands, which seems strange to me, because it's not a dating website, after all"; "Many women put in some ridiculous demands, you wouldn't believe it, but they claimed what they were looking for was a well-to-do, unmarried man with no children. I understand that it's a serious business but in the few months that I have been on this site I keep seeing the same faces. What does it say to you? Time goes by but nothing comes of it"; "A clear and straightforward description of the woman's expectations is always preferable to hints and innuendos, but it is the latter what you normally get". On the other hand, one of the donors, who created a woman's account on such website, described his experience in the following way: "You get a lot of halfwits looking for sex adventures or those who themselves haven't the slightest idea of what they are looking for".

Our interviewees also admitted feeling exposed to a competitive environment when they offer their services online. In order to attract attention, donors often describe their ancestors' achievements: "I have a good ancestry, my ancestors were scientists, engineers, state officials, entrepreneurs, famous military commanders and other respectable people. Longevity runs in my family. Moreover, we have always sought to work for the good of our country and people". Some donors also post information about their health status, hobbies, interests, skills and other strengths: "I am a civilized, cultured and well-rounded, educated person (biochemist). I don't have any bad habits or addictions or a propensity to form bad habits. I am employed in the medical sphere, have a lot of interests and hobbies, in particular I am interested in science, technology, and robotics, I have an active, healthy lifestyle"; "I am by no means a couch potato, sitting in front of a telly surrounded by beer cans. I play bass, I play an ordinary guitar and percussion, I used to play in a local music band. I am good with hands and can do just about any job that needs to be done around the house such as repairing household appliances or build a house"; "I have contributed to many successful conceptions, the resulting children are all healthy and good-looking; when they grow up, they will be successful and positive people, just like their biological father".

Medical Aspects

All of our respondents claimed that they enjoy good health, do not smoke and seldom drink alcohol. Three of them practice sport from time to time, all the others do it on a regular basis: “I have an active and healthy lifestyle in all seasons—volleyball, cycling, jogging, swimming, skiing, snowboarding”; “I practice sport: fitness, swimming, tennis, I have recently started learning to play golf’; “I used to box, to do martial arts and now I am into yoga”.

All respondents pay much attention to the safety of sperm donation and agree that a preliminary medical check-up is necessary. The respondents either claim that they have up-to-date medical test results necessary for donation or that they are ready to renew them on first demand: “I am healthy, free of infection, and fertile; I am ready to show all the necessary documents”; “I have all the necessary medical tests, including a karyotype test, PCR swab test, spermogram, rhesus negative blood, which means that my sperm is suitable for all women who want to have a healthy baby, blood group O, the most common blood type”. A similar attitude to matters of safety and health is expected of the potential recipients. Almost all our interviewees pointed out that they do not consider women with bad habits (especially smoking): “To improve your chances to have a healthy baby I think both of us need to go through a medical check-up (I hope you understand why)”. All donors are particularly attentive to questions of genetics, in particular “good genetics”.

Only two men are ready to consider conception through intercourse: “Natural conception is possible provided there is mutual attraction and we both go through a full medical examination at a trustworthy medical centre. For me artificial insemination is an easier option”. These respondents also point out that for them, sex as such is not a goal: “I am not looking for sex on the side, I have no problem with this”; “I use a contactless method—artificial insemination or IVF. In other words, I am not trying to satisfy my sexual needs”. Others prefer artificial insemination conducted at home or IVF in a medical clinic. Almost all donors feel positive or neutral about IVF, claiming that “it is the end result that matters, not the means to achieve it’ and that ‘it’s” up to the woman to decide”. Nevertheless, our respondents feel uncomfortable with the formal IVF procedure since it requires them to provide their personal data and sign the documents, therefore disclosing their identity. Staying anonymous is a crucial requirement for many of them. Several of our respondents reported the difficulties they faced in the process: if a man acts as a non-anonymous donor, he has to pass all the necessary medical examinations and tests, including “quarantining” of their donated sperm for six months and repeated testing afterwards. Thus, it takes a long time before the actual procedure is performed. If the recipient woman is single, she can introduce the donor as her boyfriend but in this case, he would have all the rights and obligations in relation to the resulting child, which is something not all women are ready for as well as the donors themselves. One of the donors shared his experience of cooperation with a married couple: “I just turned up at a clinic with her husband’s documents and said that I am her husband and nobody suspected anything”. This situation is not surprising since this couple had been looking for and found a donor that would look like the husband.

Donation Experience and Donors' Expectations of Recipients

Potential donors may have various expectations concerning the desired recipients. Four of our respondents consider only single heterosexual women. These men also impose additional requirements, including the woman's family, her age, financial status, appearance, habits, and life style: "I am looking for a non-smoking, confident woman, with natural beauty (no botox, silicone, especially huge silicone lips), preferably with income not lower than average for conceiving one or two babies"; "There are little chances that our acquaintance and communication will come to something if you already have a husband and/or a permanent partner—I want to be the child's sole father"; "I am looking for a down-to-earth woman without bad habits. She should be registered in Moscow or Moscow region and she should have a place of her own for the child to live in".

Three other donors, on the contrary, are interested only in heterosexual married couples as a guarantee that the child will be living in a traditional full family and will be well provided for: "A child is not a toy, which is why family couples are desired"; "I am not a fan of fatherlessness and I am not thrilled at the prospect of my children living somewhere without my help or supervision", "I have to be sure that the child will have everything he or she needs and a full family". Other respondents are less demanding and are ready to cooperate with a heterosexual or a homosexual couple or a single woman. The majority of our respondents (eight out of eleven) claimed that mutual attraction is necessary for donation; one of them thinks that "it is necessary to reach some agreements". Interestingly, he is now engaged in negotiations with a potential recipient and has no previous experience of donation.

Seven out of eleven donors claim that they already have children conceived by donor insemination and four already have fathered 10 children or more. Two respondents have previously donated their semen to sperm banks and received remuneration. At the moment of the survey one of the respondents has already passed the upper age limit and is no longer eligible as a donor for sperm banks, another has landed a good job and ceased to depend on financial compensations for donating sperm. Nevertheless, both of them continue offering sperm donations online. Interestingly, they do not require "mutual attraction", the only thing that they insist on is their anonymity. One more respondent is now undergoing a medical examination at a clinic in order to be able to donate sperm to sperm banks. He commented that it is a really lengthy process. The majority of our respondents are unwilling to donate in a formal setting because of the lengthy period of waiting for the test results to arrive and because of much red tape. Moreover, to them the whole process seems "sterile and impersonal" and one of the respondents commented: "I simply can't stand hospitals".

Interactions between the Actors Involved in the Donation Process

Most interviewees have said that the process of conception takes time, it also requires a lot of discipline, punctuality and tact: "I would like to make this very awkward moment easier for the woman as much as I can; it's a very personal thing"; "I understand that for a successful conception regular meeting are necessary on certain days for

several months and I am committed to ensuring the desired result, I am responsible and punctual as far as agreements are concerned". Six respondents are ready to travel to a recipient woman's city at their own expense in order to make the process of conception for her as convenient and comfortable as possible. Five respondents are planning to support the mother and the resulting offspring financially or are already doing so. One is ready to cover the IVF expenses or have already done so.

All of the respondents replied negatively to the question as to whether they are ready to marry the mother of their future child. As it was mentioned above, many of them prefer to deal with couples rather than single women. Nevertheless, almost all of the respondents had difficulty in answering the question about their relationship with the woman's husband or partner. The husband takes part in decision-making, approves or disapproves of the donor candidates, in some cases ensures the woman's security in face-to-face negotiations. There is normally no informal communication between the husband and the sperm donor, which is not surprising, because the fact that the woman has a heterosexual partner automatically excludes any possibility of the donor's further communication with the mother or the child. At the same time, the woman's partner in a homosexual couple is perceived by the respondents in the same way as the recipient woman herself. Both donors who had an experience of dealing with same-sex female couples observe that such couples are easier to engage with, "maybe because two women together are less afraid".

Most donors reported having some negative experience of dealing with potential recipients via e-mail, telephone or in face-to-face communication. For example, they mention the bizarre behaviour of some potential recipient women: "I asked her what time would be most convenient for my visit to her city so that we could meet and then all of a sudden she snaps at me saying that she isn't a hotel or a B&B. I didn't even have time to answer that I was going to cover all the expenses"; "Don't message me if you are married, with children, or poor"'; "We've been writing to each other for a month, discussed everything, I was about to buy tickets and suddenly she just disappears"; "She looked at me and started demanding alimony for the child that didn't even exist yet", "She turned up looking like a dance club goddess or a star of the Olympus, all dolled up, plastered, and I thought: what's wrong with you? do you want a child or what?", and other awkward moments. There is, however, a general opinion that if the donor and potential recipient manage to get past this stage and "get into action", they usually get along well.

Four interviewees consider having a contact with the future child as highly desirable or even necessary. Even though two of them are married with children, the same four respondents are ready to register as the child's legal father and consider the child their heir in all meanings of this word. Three respondents under no circumstances are ready to maintain contact with their future child, the rest leave it for the woman to decide.

Five respondents have already contributed to the birth of children by donating their gametes and maintain contact with them in different ways: "On the introduction website I met a woman, with whom we have an excellent friendly relationship and we've had two children together. However, I'll also be happy to have children from other women"; "I keep in touch with all the mothers. So far it has been easy—the

children are small and I come to see them, too. Older children already call me Daddy, their mothers say that I should come more often"; "I support all my women and children, including financially—there are feedbacks from the women", "I don't often see my son, but he knows that I am his father". Only one respondent involved his parents into the communication and upbringing of the children he fathered by donating: "They are just regular Grandma and Grandpa, who can take their grandkids for a weekend; my mother is very happy with this". This, however, concerns not all of his children but only two of them—a boy and a girl, born from two different women who were willing to maintain further contact. He comments that the women are acquainted with each other and their children know that they are a half-brother and half-sister: "They behave like ex-wives would, except for the fact that there are no grudges to hold, and I think my mother told her neighbours the same".

Four respondents are open about being sperm donors; four have special websites or groups in social media where they publish relevant and up-to-date information about themselves. One of them is married and his spouse approves of what he does because he uses only a "contactless method of insemination": "I told her that I am solely interested in leaving a large progeny, spread my genes, and she understands that it has nothing to do with infidelity". Three other respondents are formally married. One of them is ready to inform his wife if he fathers a child provided that he chooses to maintain contact with this child. Two others say that they don't want their wives to ever find out about it. Out of the remaining four respondents, to the question if they are going to tell their family members about their decision to donate, three said "no and I never will", and one said that he will act "depending on the circumstances". The majority of the respondents who wanted to stay anonymous as donors answered the question "Why do you hide this part of your life?", by claiming that their friends and family members "won't understand' them or said 'I don't know who I can talk to about this". None of our respondents signed any contract with the recipients, except for the documents at the IVF clinic.

Motivations

The simplest motivation is the desire "to continue my lineage". These men, for different reasons, cannot satisfy this desire with their current partners ("This topic is considered closed in my family, with grown-up children and my wife already a grandmother") or they cannot do so due to the absence of a permanent partner ("I am not ready to start a family, I don't want to get married and I won't"). However, they are ready to officially acknowledge paternity, participate in the child's upbringing and make him or her their legal heir.

Moreover, some donors emphasize that they pursue altruistic motives: "I try to help people, I volunteer to search for missing persons and I help when a see an accident on the road, and I can help by donating"; "I do it because I can, in my inner circle of friends there was a couple who couldn't have children, I helped them and the first try was successful, I liked it"; "I feel like a certain kind of benefactor, it's no trouble for me to do it and I can make somebody happy".

Some of the respondents spoke of donation as an opportunity to pass over their genes and leave progeny: "Somebody has to contribute to this country's gene pool"; "Procreation is a natural state of a man"; "It's important for me to know that the children continuing my bloodline walk this Earth", "I want to continue living in my children after I die, in them I live on and the more of them, the better".

Many respondents emphasize that donating helps them make their life more meaningful: "I'm looking for some kind of meaning in everyday routines, giving somebody the gift of life is not a bad idea"; "I've achieved everything I wanted in life, now I'd like something else"; "Mothers are grateful to me, I see how my children are growing and it brings meaning to my life".

Discussion

Although social advertising is used extensively in Russia, adverts urging men to donate sperm are still unimaginable. Therefore, private donors advertise their services online. Unlike the UK or Austria, for example, where "sperm donation involves typical commodity exchanges in unconstrained marketplaces" (Sobande et al., 2020, p. 71). Sperm banks are competing for donors and professional advertising agencies are employed to advertise services of this kind in top printed media and on television. The reasons why Russian donors go online are the same as for British donors: easy access, control over the situation and anonymity and opportunities for staying informed about the results of the process and keeping in touch with the resulting child (Freeman et al., 2016).

For our respondents, sperm donation in formal settings was unacceptable for different reasons. As Bossema et al. highlight, the reasons in favour of formal settings are predominantly concerned with what they refer to as "cautious motives" such as having "legal and physical protection, evading social consequences, and having a simple procedure in terms of effort and finances" (Bossema et al., 2014, p. 24). Donation through a fertility clinic is safer in terms of genetic disorder prevention; it also prevents unwanted paternal feelings or social disapproval by friends or recipient. This observation was confirmed by the results of our survey, whose participants reported having to face the negative reactions on the part of potential recipients and to deal with ethical problems in relation to their own families and partners. Reasons in favour of informal settings are described by the same authors as "approach motives", that is, the ones "relating to procedural involvement and contact with the donor child and the recipient" (Bossema et al., 2014, p. 24).

It is interesting to compare a number of aspects in the experience reported by Russian and Canadian donors who took part in a similar survey (Lavoie et al., 2018).

The following similarities were identified:

- Both Russian and Canadian donors are not interested in the prospect of marrying a recipient woman and wish that the process of insemination be conducted on a neutral territory rather than in the recipient's residence;
- In general, the donors are aware of the health implications associated with this practice and take their own health seriously, undergo regular medical check-ups and prefer insemination through donation rather than sexual intercourse.

All of the donors were quite well-informed about ART and were ready to consult potential recipients on these matters;

- Both Russian and Canadian donors consider donation a meaningful and satisfying experience but, with rare exceptions, are quite discreet about their donation experiences and are generally unwilling to share them with family or friends, preferring to stay anonymous.

There are also differences between the donors in Canada and Russia:

- The third of Russian donors (four out of eleven) consider the possibility of maintaining contact with the resulting offspring crucial, that is, they would like to perform the role of a father, even though it will happen outside of the traditional family setting. In contrast, all Canadian respondents agreed that "their role with regard to offspring was limited to genitor or biological father and that their involvement in the child's daily life was neither expected nor wanted" (Lavoie et al., p. 194);
- Unlike Canadian donors, most of whom prefer to use some kind of a "contract" describing the rights and responsibilities of both parties, none of the Russian donors we interviewed reported signing any legal documents, apart from those required by the fertility clinic;
- Only Russian men discriminate potential recipients based on their social and/or marital status: some donors are ready to deal only with single and well-off women, some are interested only in family couples. Canadian donors appear to be much less demanding in this respect.

Regarding the motives behind men's decision to donate their gametes, we can conclude that it requires a certain form of altruism, taking into account the amount of time and energy the donors have to invest (Bay et al., 2014).

Conclusions

Informal sperm donation is a relatively new phenomenon in Russia. As ARTs are becoming more popular and accessible and society more accepting to assisted reproduction, the demand for informal sperm donation is growing. One of the factors contributing to this demand is undoubtedly the Internet as digital platforms facilitating donor-recipient interactions are proliferating, thus providing a fast and cheap access to this service.

Participants in our survey admitted spending a large amount of time and resources on this activity while trying not to make this fact public. By their estimates, in total, they fathered nine children of their own and 47 were conceived through artificial insemination. One of our respondents remarked that "a private sperm donor has an IQ which, as a rule, significantly exceeds the average level". His opinion is indirectly supported by the level of education of our respondents: only one of them has no higher education, two out of eleven hold two or more diplomas of higher education and two more have graduate degrees.

Although the majority of donors are single or have no permanent partner, none of them has the intention of marrying the mother of the resulting child or starting

a traditional family. Many would like to keep in touch with their children or already do so but only one of them has involved his family members into communication with the children and thus has created something resembling familial relationships. Others either avoid discussing the fact of fathering a child at all or inform their inner circle of this fact but prefer not to meet the child in their own homes and do not tell their family members about the details of these meetings.

Thus, in the established practices of informal sperm donation in Russia, men not only provide their genetic material but also spend time and invest considerable resources in procreation and further support of their offspring. At the same time these men are unwilling to start a family, which points to the fact that here we are dealing with a quite interesting phenomenon of extrafamilial reproduction. In this case, the respondents do not associate the parental project with traditional family and its values. In his seminal work *The Transformation of Intimacy*, A. Giddens (1992) noted that modernization processes are gradually changing the functions of the modern family. As a result of the rising female labour force participation, which started in the first third of the twentieth century, women became more capable of acquiring income of their own and could provide for themselves and their children, thus becoming more independent of men. Consequently, there was a reduction in the inequalities in the division of household labour and in the significance of the economic function of the family. After the sexual revolution of the 1960s, sexual relationships, which previously had been considered legitimate only within the strict boundaries of heterosexual marriage, became more socially acceptable. The stigma of shame was largely removed from sex, which led to more sexual freedom for women, with the exception of radical conservative circles. The development of birth control technologies made a substantial contribution to these trends, allowing women to defer pregnancy. Thus, the emotional and reproductive functions of the family were separated. The latter remained a solid bulwark of "family values" since childbirth and upbringing are still largely associated with heterosexual marriage and matrimony while pregnancy in marriage is still perceived as more socially acceptable than pregnancies out of wedlock. The development of ARTs, however, has led to significant social changes, and reproduction outside the family has started to be more widely practiced. Moreover, modern means of communication considerably facilitate this practice.

The majority of our respondents identify themselves as middle-income. They, however, do not see this fact as an obstacle to covering the expenses associated with donation and, in some cases, offering financial assistance to the recipient woman and resulting child.

Only one man decided to openly discuss his desire to donate sperm with his wife and to seek her agreement. The desire to stay anonymous, especially in the case of married men, raises the question of how ethical this situation is in relation to the donor's partner, who finds herself in a strange and dubious situation: although the contactless insemination method preferred by the majority of our respondents cannot be considered as sexual infidelity, their partners would still have to deal with the fact that these men have a second, "secret" life of their own.

The donors reported that the choice of the insemination method is determined by the degree of "informality" of the situation: they have to see for themselves that the mother of the resulting child is a normal, sensible person who would be able to raise a happy, healthy child; discuss the possibility of keeping in touch with the child in the future and maintain contact with him or her or, on the contrary, to make sure that they will be in no way legally bound to the child. We share the opinion of our Canadian colleagues in that "it would also be useful to study the views, experiences, and practices of recipients to gain a better understanding, in particular of the pathways that lead single women and couples (both lesbian and heterosexual) to publish online requests for donations" (Lavoie et al., 2018) and believe that further investigation in this sphere is necessary.

The methodological framework for this research also needs further elaboration: for example, it is necessary to clarify how to calculate and verify the number of children conceived from informal donors. Russian legislation does not regulate these practices in any way, although it is already obvious that matters of filiation created by informal donor conception and the need to keep count of the children born from this or that donor is becoming increasingly important.

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ARTICLE

Forest in the Context of Social Change: Traditional Orientation and Forest Mystification in a Nigerian Forest-Reserve Setting

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ABSTRACT

This article exposits the mystification of forests among people residing in proximity to a forest reserve in southwestern Nigeria. The theory of material engagement and the ecology of human development support the position that the forest is a classical motivator of traditional culture. Still, socio-cultural change is prevalent. As an element of this change, forest-based social cognition warrants systematic examination in the interest of environmental sustainability. This is because the concurrent conveyance of sustainability-promoting immaterial culture across generations is a component of the pathway to a sustainable future. Moreover, systems theory posits that social events affect each other. Since social change is not solitary but encompassing, forest mystification was examined along with other indicators of traditional orientation including attitudes towards religion, ageing and gender, as well as cultural enthusiasm. The results indicate that forest mystification is still huge and connected with orientations towards ageing and cultural enthusiasm. This exemplifies the Yorùbá social context's manifestation of continuity as opposed to change in forest culture; and stands in solidarity with traditional African mentality.

KEYWORDS

social change, forest mystification, Africa, Yorùbá, traditional orientation, age, culture, religion, gender

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Introduction

From time immemorial, human's natural environment is the base of his subsistence and cultural progress, showcasing the interconnectivity and interdependence of humans and their persisting and evolving ecosystem. This presumption underlies the focal argument of the Material Engagement Theory (MET), which places the material world at the heart of human cognitive development and change. MET is a platform expounding the active function of material culture or things in the composition of the human mind (Roberts, 2016). It is a denunciation of the Cartesian dichotomic separation of the mind, which is regarded as active; and the material world, which is construed to be passive (Graham, 2019; Roberts, 2016). It promotes the ideology that there is a dynamic relationship between the material world and the cognitive world, with the former promoting the development of the latter. Material culture is therefore a tool of analysis for cognitive science (Malafouris, 2004) and of course, human social thought. It is an active determinant of culture and who we are. Material things ecologize and educate the mind of the individual and the collective (Graham, 2019). Further, MET is synonymous with Bronfenbrenner's (1977, 1979) ecology of human development, which canvasses principles and analytical traditions that underscore the interconnectedness of human lives/outcomes in changing ecological contexts. Social cognition is said to be ecological-context-dependent, making social thoughts develop *pari-passu* with human ecology (Kilanowski, 2017; Lyons et al., 2019).

The theoretical supposition of MET and the ecological perspective explicates the logic of the Yorùbá socio-cultural reality. The forest is a classical locale of traditional culture among many peoples including the Yorùbá of southwestern Nigeria. The Yorùbá people are typically referred to as *ọmọ káàárọ̀-oòjíire, ọmọ Oòduà* (literally, the one who greets themselves in the morning by asking how the other is faring, descendants of *Odùduwà*). The people are one of the three dominant ethnic groups in Nigeria (the others being the Igbo of the southeast and the Hausa/Fulani people of northern Nigeria). Being one of Nigeria's six geopolitical divisions, the southwestern region and its *Yorùbá* people constitute about 18% (Okolie et al., 2018) of Nigeria's population, which is over 200 million (Population Division, 2019). The term *Yorùbá* evolved as a nomenclature to describe the people in the early 19th century (Ajala, 2009). The need for such a nomenclature was borne out of the "internationalisation of political and economic forces, which favours generalization" (Ibrahim, 2020, p. 750). Prior to the 19th century, Yorùbá people were autonomous groupings and they recognized themselves according to different Yorùbá dialects such as the Ijebu, Ifẹ, and Ọyọ (Ibrahim, 2020, p. 750). Despite the dialectic divisions, the Yorùbá share tremendous cultural features including myths regarding the origin of human being and the recognition of *Odùduwà* the prime ancestral figure (Ibrahim & Jegede, 2017a). This underscores the homogeneity of the cohorts that make up the *Yorùbá* people.

The Yorùbá see human being as being on a journey between *ayé* (the world) and *ọrun* (heaven). The world is perceived as a market place whereas heaven is human being's real home. At the same time, *ọrun* is projected as a very mystical place comprising supernatural bodies. Yet, the world is also believed to be a

strong manifestation of the supernatural bodies that ideally belong to *ọrun*. Hence, the world is perceived as being manoeuvred by supernatural forces. The Yorùbá strongly believe that there is "an interface of the visible and invisible, the tangible and intangible, the known and unknown[…]; the act of looking and seeing in Yorùbá culture is much more than a perception of objects by use of the eyes" (Lawal, 2001, p. 521). The people believe that "the invisible world is symbolized or manifested by visible and concrete phenomena and objects of nature" (Jegede, 2002, p. 323). For instance, in an interpretative analysis of Yorùbá proverbs, Ibrahim (2016) reported that forests and trees are "humanized" by the people. Yorùbá proverbs convey the idea that trees are seen and referenced like human beings in the culture. Further, the forest and its physical dynamics reverberate through the socially constructed knowledge of the Yorùbá. In this culture, the forest is a mystified cultural creation. Adeduntan asserted as follows:

> To the Yorùbá, the bush or forest is not just the habitat of flora and fauna, but also of spirits – *iwin*, *ẹbọra*, *ànjòṣọ́nú*, *sẹ̀rankosènìyàn*, *ọ̀rọ̀*, and so on. In other words, the bush or forest is a realm of the infinite where the giant rat may tie up the hunter's dog, the *ìrókò* (a tree, the *Chlorophora excelsa*) might tell the hunter in which direction to seek game, and porcupines could perform in a concert. (Adeduntan, 2019, p. 2)

As noted earlier, mystification is generously featured in Yorùbá culture, not just the forest-related. Perhaps, the greatest indication of the mythological concentration of Yorùbá thoughts about forests is encapsulated in the writings of Daniel O. Fágúnwà (for instance, 1949, 1954), whose fictional expositions capture a true picture of cultural dynamics among the Yorùbá. Nobel Laureate Wole Soyinka asserted that Fágúnwà's novels are robust projections of Yorùbá culture, which is supernaturalistic and "densely mythological" (Soyinka, 2010, p. 3). Smith (2001) also concurred that the novels purvey Yorùbá culture. The literal title of some of these novels including *"Ògbójú Ọdẹ nínú Igbó Irúnmọlè"* (Fágúnwà, 1950, translated as *The Forest of a Thousand Daemons* by Soyinka, 1982), is a remarkable projection of how Yorùbá culture and mentality is shrouded around their material physical environment which is dominated by rich forestall vegetation. Certainly, the MET and the ecological perspective find vindication in the Yorùbá socio-cultural parlance.

At the same time, the omnipresence of socio-cultural change in human communities globally is resounding. Analysing data from four waves of the World Values Survey conducted between 1984 and 2004 with participants from 72 countries, Li and Bond (2010) reported evidence indicating that people are globally becoming more modern or secular in their orientation which is independent of socio-economic development. Social change is prevalent everywhere including among the Yorùbá due to several factors, especially western contact (Lawal, 2001; Olurode & Olusanya, 1994). Notwithstanding, cultural survival is also prominently featured especially in African contexts. For instance, Opefeyitimi (2009) asserted that, despite modernity and change, Yorùbá people subscribe to paranormal explanations, which populate their worldview. Jegede (2002) similarly reported how supernatural entities are

important aspects of the perception of disease aetiology, making people engage in cultural practices such as charm-use and scarification to earn health. In the report of a qualitative study conducted among smallholder farmers to explore beliefs regarding climate change in northwestern Nigeria, Jellason et al. (2020) expounded how participants dominantly practised socio-cultural adaption to climate change such as making sacrifices and praying to God. Indeed, traditional orientation is still reckoned with. This orientation is premised on being connected with pristine culture. However, this orientation is also a continuum that features modernistic orientation at one of its ends. Determining the connection between traditional orientation (using specific indicators) and the traditionality of orientation towards the forest is the prime goal of this study. This goal is consequential for sustainability especially from socio-ecological and MET's perspectives.

Forest-Based Social Cognition to Track Social Change in the Interest of Sustainability

Borrowing from the much-referenced Bruntland Commission's definition of sustainability, the current generation ought to consider the needs of future generations and decline from defiling future generation's capacity to fulfil such needs (World Commission, 1987). Invariably, sustainability is a proposal for continuity or change, whichever is in favour of responsible use of environmental resources. From the socio-ecological perspective and MET's conception of the mind and material synergy, people think amidst rather than a detached environment. Consequently, sustainability ought to necessarily encompass the conveyance of immaterial culture/mindset of sustainability in addition to material resources. Both variables are essential elements of sustainability, which direct any pathway to a sustainable future. Sustainability entails the ecology of the mindset of current and future generations. In other words, people's persisting and evolving mindset or community psychology, which developed in the context of certain material entities such as forests, deserve to be focused. Examining prevailing forest mystification in the interest of tracking change in social thought is therefore justifiable.

Moreover, it is established that social change is the outcome of changing human cognition, which is generated in an ecological context (Alwin & McCammon, 2003; Bandura, 2001, 2004). While mystification manifests itself in individual behaviour, it originates from a forest-ecological context. Examining forest mystification is therefore tantamount to examining the relationship between the individual and society, which is a classical question of all time. This examination is a potential indicator of the social change being created in the Yorùbá social context. Further, social change entails a shift in the pattern of people's behaviour, a difference in their ways of participating in the world. This behavioural component of social change is preceded by the cognitive and emotional components of change (Graham, 2019). Still, cognitive, emotive and behavioural components exist interconnectedly. Social change is manifested in social practices and multiplied through mindsets. Social cognitions regarding forest, the emotions that forests emit and people's forest-

related behaviour are therefore intertwined. Forest mystification is the quintessence of cognitive-emotive components, which precedes forest-related behaviour whose examination is therefore warranted.

The criticisms against evolutionary theories have shown that social change is not unilinear (de Vries, 2017; Gedeon, 2018). Instead, social change encompasses several aspects of society. The focal contribution of systems theory, which undertones material engagement theory and the ecological perspective is simply that one thing affects the other (Mandavilli, 2018; Strain, 2007). Human social life occurs by the ongoing interaction among forces including physical and cognitive, as well as cognitive versus cognitive phenomena. It is virtually impossible to fully appreciate changing or continuing forest mystification for instance, without taking into account other elements of traditional orientation in the Yorùbá social context. Social phenomena are complex because of their interconnectedness. This complexity must be acknowledged by considering forest mystification in the context of other traditional social thought. Developing a model of traditional orientation to examine its influence on forest culture or mystification is therefore apposite. Hence, the articulation of social change on the premise of forest culture is appealing especially in a forest-shrouded Yorùbá social context. A speculative model of traditional orientation featuring attitude to—religion, ageing, gender; and cultural enthusiasm—to establish influencers of forest culture or mystification was therefore developed. The correlations between each element of this model and forest mystification were examined.

Attitude towards Religion, Ageing, Gender and Cultural Enthusiasm as Traditional Orientation

Religion is a ubiquitous social phenomenon that permeates virtually all facets of human society (Ives & Kidwell, 2019), and reflects people's identity construction and decision-making (Kose & Cinar, 2020). About 84% of mankind is associated with a religion (The Changing Global Religious Landscape, 2020). Meanwhile, there is a great diversity of beliefs and practices across and within world religions. In pre-colonial Africa, people were engrossed with the traditional religion, which has deep connections with the culture and practices of the people. Contemporary religions especially the Abrahamic ones are precariously practised by the people. Attitude towards religion is a focal indicator of traditional orientation because religious orientation and supernaturality becomes attenuated with increasing modernity (Durkheim, 1912/1976; Hardy et al., 2020; Weber, 1946). Secularization, science and increasing rationality is associated with modernity (Berger, 1999; Edgell, 2006; Norris & Inglehart 2004; Wuthrow, 2007).

In addition, increasing change in human societies characterized by urbanization and westernization is concomitantly associated with increasing negative attitudes towards ageing. Youthfulness is prized in modern contemporary society while ageing is linked with poor health, reliance on others and lonesomeness (Black, 2009; Kalfoss, 2017). Fealy et al. (2012) reported that older people are collectively

stigmatized with several negative identities like fragility, infirmity, vulnerability, etc. Yet, in more traditional societies such as in precolonial Yorùbá society, age is revered. The anthropological study reported by Schwab (1955) indicated that everyday life in Yorùbá society features the principle of seniority tremendously. Gerontocracy is generously featured in the socio-political life of the Yorùbá (Fadipe, 1970). Hence, the traditional attitude towards ageing is, by all means, an indicator of traditionality.

The attitude towards gender is crucial signification of traditional orientation or otherwise. Perhaps the most typical phenomenon characteristic of all human societies in their historical past is the subservient position of women as opposed to men (Ibrahim, 2019). Yet, the egalitarian positioning of women bears positive consequences for national economies (World Bank, 2012). Social values hardly advocate women empowerment, especially in more traditional settings. Egalitarian gender roles underlie societal advancement and such equity becomes vivid with increasing development. No wonder gender inequities are more characteristic of less developing countries (Duflo, 2012) like Nigeria. Such countries tend to demonstrate unequal attitude towards gender, thus marking the commitment towards traditional orientation.

Cultural enthusiasm is people's keenness and excitement regarding their traditional, pristine culture. It is very conceptually close to cultural conservatism, which is about protecting ancient culture (Crowson, 2009). Studies have shown that cultural conservatism/enthusiasm is positively related to self-esteem (Crowson, 2009; van Hiel & Brebels, 2011). Cultural enthusiasm represents traditionalism (van Hiel & Kossowska, 2007) and is, therefore, a prime indicator of traditional orientation.

These variables—attitudes towards religion, ageing, gender and cultural enthusiasm—collectively constitute the model of indicators of traditional orientation in this study (see Figure 1). Each of these variables is expected to influence forest mystification in the target population. Invariably, the major objective of this study is to examine the influence of each variable on forest mystification. Forest mystification was highlighted as a variable, while the effects of respondents' sex, education, age, religion and ethnicity on this mystification were also determined.

Figure 1

Traditional Orientation and Its Indicators

Materials and Methods

The Study Sites

The study sites include eight communities within a 1–5 km radius (see Table 1) of the Onigambari forest reserve. The reserve is located in Oluyole local government area (LGA) of Oyo state, southwestern Nigeria. Nigeria's southwestern region is the homeland of the Yorùbá people. Oyo state is one of the six states constituting the southwestern region while Oluyole LGA is one of the 33 LGAs in the state. The Onigambari forest reserve is located on latitude $7^0 8'$N and $7^0 3'$N longitude $3^0 49'$E and $3^0 22'$E. It was declared a reserve in 1899 by Ibadan city council—the British-colonially created unit that included indigenous chiefs in the administration of Ibadan. The reserve occupies a land area of 13932.18 hectares.

Table 1

Projected and Sampled Population of Study Sites

Study sites	1991 population	Projected population (2000) @ 2.5% growth rate	Projected population (2010) @ 2.6% growth rate	Projected population (2020) @ 2.6% growth rate	Proportionally sampled population
Olubi	297	372	482	625	22
Onigambari	600	751	974	1,263	44
Oloowa	95	119	154	200	07
Busogboro	532	666	864	1,121	39
Onipe	410	513	665	862	30
Dalli	351	439	569	738	25
Olonde	215	269	349	453	16
Seriki	102	128	166	215	07
Total	**2,602**	**3,257**	**4,223**	**5,477**	**190**

Study Design/Sampling Procedure

This study is a snap-shot, non-experimental cross-sectional survey targeting members of communities around the Onigambari forest reserve, Nigeria. Eight communities adjoining the reserve were identified. The population of each community as at the year 2000, 2010 and 2020 were projected. These projections were based on the population of the communities as declared at the end of the 1991 national census (National Population Commission, 1998), using the formula:

$$P = P_0 \times e^{rt}$$

Where: P = final population, P_0 = initial population, r = growth rate (at varying growth rates, see Table 1), t = time interval (varying time interval, see Table 1). The projected population of the communities is 5477 and was taken as total population (N) for the study. The following modified version of the Cochran formula was then used to calculate sample size:

$$n = \frac{\boldsymbol{Npqz}^2}{\boldsymbol{l}^2(\boldsymbol{N}-1)+\boldsymbol{pqz}^2}$$

Where *n* is the sample size, *N*, the population size = 5477, *p*, the (estimated) proportion of the population that has the attribute in question at assumption of 50% = 0.5; *q* is 1–*p*; *z* is the z-value obtained from z-table for 95% confidence which is 1.96; and *l* is the desired level of precision (i.e., the margin of error) which is set to 7% or 0.07. The required sample size was 189.3 ≈ 190. The selection of respondents from the eight sampling units was based on proportional representation: the projected population of each community was divided by the total population of the eight communities (5477) and multiplied by 190. The number of samples drawn from each community is shown in Table 1.

Instrument of Data Collection

A structured questionnaire was used to collect data. The questionnaire was translated into the Yorùbá language to ease its administration among respondents who do not speak the English language. The questionnaire was administered through structured interviews. The aim of the study was explained to every potential respondent while their anonymity was assured. They were enjoined to offer their consent to participate in the study. Respondents indicated their informed consent by appending their signature in an informed consent form.

Definition/Measurement of Variables

- *Attitude to religion* was defined in this context as the degree to which respondents are confident in their religion. It was measured with the four-item turning to religion sub-scale of the multidimensional coping inventory, assessing how people deal with stress (Carver et al., 1989). Samples of items include: "I put my trust in God", "I try to find comfort in my religion". Responses were "totally true (2)", "fairly true (1)" and "not true at all (0)". Cronbach's alpha was 0.745.
- *Attitude to ageing* was defined as the respondent's evaluation of the extent to which pleasurable things and respect are attracted to older age. This was assessed using four of the eight-item psychological growth sub-scale of the attitude to ageing scale (Laidlaw et al., 2007)[1]. Responses were "totally true (2)", "fairly true (1)" and "not true at all (0)". Cronbach's alpha was 0.734. Examples of items are: "there are many pleasant things about growing older", "I am more accepting of myself as I have grown older".
- *Attitude to gender* was operationally defined as the degree of respondent's acceptance of egalitarianism in the assignment of social roles between men and women. It was measured with the eight-item gender-linked sub-scale of the social role questionnaire (Baber & Tucker, 2006). Responses included "strongly agree (4)", "agree (3)", "disagree (2)" and "strongly disagree (1)". Cronbach's alpha was 0.676. Examples of items are: "for many important jobs, it is better to choose men instead of women", "mothers should work only if necessary".

[1] The four selected items are reflective of peoples' attitude to ageing irrespective of their age, unlike other items.

- *Cultural enthusiasm* was defined as respondent's zeal regarding their culture and was assessed with the four-item tradition sub-scale of the personal cultural orientations (Sharma, 2010). Responses were also "totally true (2)", "fairly true (1)" and "not true at all (0)". Cronbach's alpha was 0.736. Samples of items include: "I am proud of my culture", "traditional values are important for me".
- *Forest mystification* was defined as the respondent's evaluation of the forest as a supernatural and paranormal spatial entity. It was assessed with a seven-item author-constructed scale whose response categories were "strongly agree (4)", "agree (3)", "disagree (2)" and "strongly disagree (1)". The scale was reliable (Cronbach's alpha was 0.885). There was a significant and positive correlation ($r = 0.193$, $p < 0.05$) between summary scores of the transcendence conviction sub-scale of the aspects of spirituality questionnaire (Büssing et al., 2014) and the author-constructed scale of forest mystification. This is taken as an indication of the convergent validity of the author-constructed scale (see Table 3 for items of this scale).

All items were scored such that the higher the score, the more traditional the attitude to religion, ageing and gender; the more traditional the cultural enthusiasm, the stronger the forest mystification. Respondent's scores were simply aggregated.

Study Hypotheses

The general null hypotheses tested are as follows:

- H_1: There will be no significant difference in the mean score of forest mystification across sub-groups of age, religion, ethnicity, sex and education.
- H_2: There will be no significant relationship between pairs of attitude to religion, attitude to ageing, attitude to gender, cultural enthusiasm and forest mystification.

Statistical Analyses

Descriptive analyses of distributions of socio-demographic characteristics were conducted using frequencies and percentages. Means and standard deviations were used for the descriptive analysis of items in the author-constructed scale of forest mystification. The one-sample Kolmogorov-Smirnov test was used to assess the normalcy of distribution of all interval-measured variables. Homogeneity of variance across sub-groups of sex, education, age, religion and ethnicity was tested using Levene's test. When homogeneity was confirmed across sub-groups of age, religion and ethnicity, equality of mean scores of forest mystification were tested using one-way ANOVA. When homogeneity was not confirmed across sub-groups of sex and education, the Mann-Whitney U test and the Kruskal-Wallis test with the pairwise multiple-comparison post-hoc test were used to assess the effects of sex and education on forest mystification. Epsilon and epsilon^2 were measures of effect sizes. Pearson correlation coefficient (r) was used to examine the nature of the relationships between pairs of attitude to religion, attitude to ageing, attitude to gender, cultural enthusiasm and forest mystification. Data were analyzed using the IBM SPSS (Statistical Package for Social Sciences) version 23.0.

Results

Distribution of Respondents' Socio-Demographic Characteristics

Most respondents were male (64.7%) while females constituted 35.3%. The mean ± SD age of respondents was 37.13 ± 11.21 (minimum = 19, maximum = 64). The distribution of respondents' age category resembles an inverted U, which reached a peak at the 36–45 age sub-group. Most respondents (53.2%) had secondary education, while a noticeable proportion (14.5%) had no formal education. Another noticeable proportion (10.8%) had post-secondary education while 3 respondents were holders of the first degree. More than half of respondents (52.6%) were Christians while Muslims were also vast (42.6%). Nine respondents (4.7%) identified themselves as practitioners of traditional religion. Yorùbá were expectedly predominant (82.1%). Hausa respondents were noticeable (10.5%) while other ethnic nationalities including Igbo, Igbira, Igede and Idoma were marginally represented in the study. The distributions of respondents' socio-demographic characteristics are shown in Table 2.

Table 2

Distribution of Respondents' Socio-Demographic Characteristics (N = 190)

Socio-demographic characteristic	Sub-groups	Frequency	Percentage
Sex	Male	123	64.7
	Female	67	35.3
Age*	16–25	31	16.3
	26–35	57	30.0
	36–45	61	32.1
	46–55	28	14.7
	56–65	13	6.8
Highest education attained	No formal education	27	14.5
	Primary	37	19.9
	Secondary	99	53.2
	Post-secondary	20	10.8
	First degree	3	1.6
	No response	4	2.1
Religion	Islam	81	42.6
	Christianity	100	52.6
	Traditional	9	4.7
Ethnicity	Yorùbá	156	82.1
	Hausa	20	10.5
	Igbo	7	3.7
	Others**	7	3.7

Note. * The mean ± SD of age was 37.13 ± 11.21, minimum = 19, maximum = 64. ** Igbira, Igede, Idoma.

Univariate Analysis of Forest Mystification/Items in the Author-Constructed Scale of Forest Mystification

The mean score of forest mystification was 23.70 ± 3.62 (range was 18 to 28). This mean is high and indicative of a strong manifestation of forest mystification in the study area. The item statistics on Table 3 shows that respondent's rating of items on the scale of forest mystification were generally similar and their agreement with items was high because the mean score of these items were all above 3 while the maximum score was 4. The generic item maintaining that forest is not just the habitat of flora and fauna but also of spirits attracted the strongest rating (mean = 3.65), followed by the item which upheld that there are creatures in the forest that cannot be seen with ordinary eyes (mean = 3.55). Interestingly, the item affirming that there are some animals in forests that are spiritual and should not be consumed attracted the weakest agreement (mean = 3.17), suggesting that mystification weakens in the face of consumable things. The idea that there are mysterious trees in forests also attracted weak agreement (mean = 3.31), suggesting weaker mystification of trees when compared with spirits and other invincible creatures.

Table 3

Item Statistics, Indicators of Reliability and Validity of the Author-constructed Scale

Forest mystification	Mean ± SD	Minimum	Maximum	Indicator of reliability (Crobach's alpha)	Indicator of validity (Pearson's *r*)
Forest is not just the habitat of flora and fauna but also of spirits	3.65±0.57	2	4		
Special creatures that are neither humans nor animals are there in forests	3.43±0.73	1	4		
There are creatures in the forest that cannot be seen with ordinary eyes	3.55±0.63	2	4		
Trees like *ìrókò* can provide directions to hunters in the forest	3.29±0.76	1	4	0.885	0.193, $p = 0.008$
There is no deity (orisa) that does not have connection with forest	3.29±0.73	1	4		
There are some animals in forest that are spiritual and should not be consumed	3.17±0.66	1	4		
There are mysterious trees in forest	3.31±0.64	1	4		

Effect of Age, Religion, Ethnicity, Sex and Education on Forest Mystification

Information contained in Table 4 shows that the oldest age sub-group made up of respondents aged between 56 and 65 years held the strongest forest mystification (mean ± SD = 25.6 ± 2.5). This was followed by the next age sub-group (46–55) whose mean ± SD was 24.2 ± 2.6. The 26–35 age sub-group held stronger forest mystification (mean ± SD = 24.0 ± 3.8) when compared with 36–45 sub-group (mean ± SD = 23.1 ± 3.9) while weakest mystification was exhibited by the youngest age sub-group of 16 to 25 years (mean ± SD = 22.9 ± 3.2). These descriptive statistics generically suggests that forest mystification strengthens with increasing age. There is homogeneity of variance across sub-groups of age regarding forest mystification ($p > 0.05$) while the result of one-way ANOVA shows that these means are not significantly different ($p > 0.05$). Hence, age had no significant effect on forest mystification. Forest was most strongly mystified among Muslims (mean ± SD = 24.0 ± 3.1). The extent to which Christians (mean ± SD = 23.4 ± 4.0) and practitioners of traditional religion (mean ± SD = 23.3 ± 3.2) mystified forest was very comparable. However, there was no significant difference in means across sub-groups of religion with regard to forest mystification ($p > 0.05$). Hence, respondents' religion also had no significant effect on forest mystification. Respondents who belonged to the Yorùbá ethnic group held the strongest extent of forest mystification (mean ± SD = 24.0 ± 3.6) while Hausa respondents were stronger in terms of this mystification (mean ± SD = 23.1 ± 2.7). Igbo respondents held the weakest extent of forest mystification (mean ± SD = 22.9 ± 4.0). However, there was no significant difference in these means ($p > 0.05$). The results in Table 5 indicate that male respondents exhibited a stronger extent of forest mystification (mean rank = 102.73)

Table 4

Effects of Age, Religion and Ethnicity on Forest Mystification

Socio-demographic variable	Sub-groups	Mean±SD	Levene's test for homogeneity of variances		ANOVA	
			Levene's statistic	*p* value	F statistic	*p* value
Age	16–25	22.9 ± 3.2				
	26–35	24.0 ± 3.8				
	36–45	23.1 ± 3.9	1.665	0.160	1.848	.122
	46–55	24.2 ± 2.6				
	56–65	25.6 ± 2.5				
Religion	Islam	24.0 ± 3.1				
	Christianity	23.4 ± 4.0	2.691	0.070	0.695	0.500
	Traditional	23.3 ± 3.2				
	Yorùbá	24.0 ± 3.6				
Ethnicity	Igbo	22.9 ± 4.0	1.454	0.218	1.090	0.367
	Hausa	23.1 ± 2.7				

Table 5
Influence of Sex and Education on Forest Mystification

Socio-demographic variable	Sub-groups	Mean rank	Mann-Whitney U test		Kruskal Wallis test		Epsilon	Epsilon²
			Statistic	*p* value	Chi-Square	*p* value		
Sex	Male	102.73	3144.50	.008	–	–	0.188	0.035
	Female	80.93						
Education	No formal Education	89.44						
	Primary	98.42						
	Secondary	98.70	–	–	11.729	0.019*	0.259	0.067
	Post-secondary	51.98						
	First degree	12.00						

Note. *The B.Sc./HND sub-group is significantly difference from the no formal education (p = 0.017), the primary (p = 0.007) and the secondary (p = 0.005) sub-groups. However, the B.Sc./HND sub-group is not significantly different from the NCE/OND/HSC/A Level sub-group (p = 0.068).

when compared with female respondents (mean rank = 80.93). The result of the Mann-Whitney U test shows that these mean ranks are significantly different ($p < 0.05$). Hence, sex has an effect on forest mystification. Epsilon was 0.188 while epsilon^2 was 0.035. Therefore, 3.5% of the variance in forest mystification is explained by sex. Forest mystification was very similar between, and most strongly held by the holders of primary (mean rank = 98.42) and secondary education (mean rank = 98.70). Forest mystification became weakened a little among respondents having no formal education (mean rank = 89.44) and was even weaker among those having post-secondary education (mean rank = 51.98) while it was weakest among first-degree holders (mean rank = 12.00). These mean ranks generically suggest weakening forest mystification with increasing formal education. Kruskal Wallis test shows that the means are significantly different ($p < 0.05$). Hence, education has an effect on forest mystification. Epsilon was 0.259 while epsilon^2 was 0.067. As a result, 6.7% of the variation in forest mystification is explained by education.

Relationship between Forest Mystification and Indicators of Traditional Orientation

The results on Table 6 indicate that attitude to religion is positively but insignificantly related to forest mystification (r = 0.085, p = 0.244). There is a positive and significant relationship between attitude to ageing and forest mystification (r = 0.335, p = 0.000). There is a negative and insignificant relationship between attitude to gender and forest mystification (r = –0.033, p = 0.663). Cultural enthusiasm is positively and significantly related to forest mystification (r = 0.213, p = 0.003).

Table 6
Relationship between Forest Mystification and Indicators of Traditional Orientation

		Forest mystification
Forest mystification	Pearson's *r*	1
	p value	.000
Attitude to religion	Pearson's *r*	.085
	p value	.244
Attitude to ageing	Pearson's *r*	.335*
	p value	.000
Attitude to gender	Pearson's *r*	–.033
	p value	.663
Cultural enthusiasm	Pearson's *r*	.213*
	p value	.003

Note. * Significant correlations.

Discussion

The univariate analysis of items in the author-constructed scale of forest mystification shows that the respondents' agreements with items were notably high, signifying the embossment of continuity as opposed to change in forest culture of mystification in the target population. This is very instructive about people's sense of solidarity with their culture, whether they are conscious about same or otherwise. As propounded by Crow (2002), social events and manifestations are typically in pursuance of solidarity. The strong exhibition of forest mystification among respondents strongly suggests that people are rather motivated and are psychically attuned with their cultural dictates of forest mystification. Indeed, this finding upholds the popularity of the African environmental theory, "eco-humanism" (Eze, 2017, p. 626) which upholds the sacredness and humanity of nature. In this African perspective, sacred nature "means that everything on Earth—rivers, mountains, trees, plants, seas, the sun, moon, stars, et cetera—has embedded force and spirit. The environment is not just inconsequential, it is part of life and constitutive of humanity" (Eze, 2017, p. 627). Indeed, this stands in favour of respectful attitude and behaviour towards the environment and its elements. In the light of these descriptive findings, proclaiming secularity as a global identity constitutes global injustice (Wilson, 2017).

Descriptive findings indicate increasing forest mystification with increasing age. This is quite expected considering that older persons have experienced and assimilated the culture for much longer. However, age was not a significant determinant of forest mystification. This suggests the strength of the continuity of forest culture: with no significant difference in younger and older people's extent of forest mystification, the survival of this culture is staunch. This is in favour of cultural survival across generations. Quite similarly, Azong (2020) reported that belief in witchcraft was prevalent among farmers of Bamenda Highlands, Cameroon of which the age

of participants expressing this belief was diverse (39 to 63 years). Respondents' religion and ethnicity have no effect on the extent to which they mystify forests. These are indications of the voidness of contemporary religions and ethnic affiliations on the traditionality of people's orientation towards the forest. These suggest that in matters of supernaturality, Africans tend to be united in orientation without reference to religion and ethnicity. Finding that men hold a significantly stronger extent of forest mystification than women is definitely an interesting piece. Although women's subordinate positioning across all facets of life in developing and developed social contexts are generously acknowledged, substantial evidence showcases the power-holding status of women in African traditional contexts. For instance, in her much-referenced book titled "The Invention of Women: Making an African Sense of Western Gender Discourse", Oyeronke Oyewumi (1997) argued passionately that gender was largely egalitarian among the Yorùbá. The stratification of gender, she argued, was colonially entrenched. Oyewumi cited the fact that Yorùbá language is not gendered to drive home her thesis. Ibrahim and Jegede (2017b) asserted that custodians of *Ifá*, the most central of Yorùbá people's frame of reference, include Babaláwo (male) and Iyanifa (female). In African contexts, women served as priestesses and diviners (Amaechi & Amaechi, 2019). Nevertheless, there are tremendous bases to the claim that women experience constraints and domination, which are informed by African social structures and norms including in the Yorùbá context. Among the Yorùbá, some taboos are instituted to exclude women from participating in traditional rites. For instance, menstruating women do not get involved in sacrificing to *Obàtálá*, a Yorùbá god. Women are also excluded from *orò*, a popular Yorùbá festival (Familusi, 2012). The report of Azong (2020) shows that women are often accused of being witches and using the same for destructive purposes including causing poor rainfall and harvests in Bamenda Highlands, Cameroon. Further, there is an abundance of language and social thoughts that dehumanizes women in African culture (Oduyoye, 2001). It is probable, therefore, that negative human-social dynamics are propelling women to be more daring to cultural dictates and indifferent rather than reverential towards cultural knowledge. As it is, the current finding asserts men as opposed to women as significantly better champions of traditional forest culture. This is an interesting focus for further research. The significant effect of education on forest mystification such that increasing formal education accompanies weaker forest mystification is consonant with expectation considering that the degree of western education correlates very strongly with secular orientation irrespective of material security (Braun, 2012; Zuckerman, 2009). This buttresses the position that formally educated people are better champions of social change.

People's orientation about ageing and having respect for culture are positively and significantly related to the extent to which they mystify the forest. Hence, the more people regard older age as attracting pleasurable things and respect, the more they exhibit zeal towards their culture, the more they perceive the forest as a supernatural and paranormal spatial entity. These findings are consonant with expectation. They indicate that people are more traditional about ageing and they are zealous about their culture. Among the Yorùbá people who are dominant in the target population, age

is superfluously revered. This society is a gerontocratic society by every standard. Everyday attitude and behaviour in the Yorùbá context are typically driven by the ideology of seniority (Schwab, 1955). Older age automatically confers authority among the Yorùbá, though this might be limited in exceptional situations where an older person's character is questionable (Fadipe, 1970). It is also in order, that cultural enthusiasm is related to forest mystification in a significantly positive manner.

On the contrary, attitude to religion is not significantly related to the extent to which forest is mystified in the target population. This can be understood in the context that attitude to religion in this study was defined in terms of respondents' devotion to conventional rather than traditional African religious practices. The insignificance of the relation between the variables under consideration can be seen as reflective of the rather conflictual relationship between them: Swidler (2013, p. 682) contended that "the axial religions [Islam, Christianity and Judaism], and especially the Pentecostal churches, devote their ritual power to a fierce war on demons, witchcraft". The attitude of the axial religions usually makes adherence to traditional Yorùbá religions to seem "heathen" and "unholy" (Ajuwọn, 1980, p. 66). The insignificance of the relation between attitude to religion and forest mystification in this study is another indication of cultural survival in the target population. African ideologies are at the heart of Africans even as they identify themselves as Christians and Muslims. For instance, Olurode and Olusanya (1994, p. 91–92) asserted that "while the Yorùbá may profess Islam or Christianity because it is the mark of a "civilized" man to do so, at heart he is a traditionalist in the sphere of the supernatural". In addition, attitude to gender is not significantly related to forest mystification in the target population, implying that people are no longer traditional about gender, at least when compared with their orientation concerning forests. Gender dynamics have been changing from traditional to modern/egalitarian even in developing nations. For instance, Hewett and Lloyd (2005, cited in Psaki et al., 2018) reported that 45% of girls and 66% of boys in twenty-four sub-Saharan African nations ever attended school by 1960. By 1990, these proportions increased to 73% of girls and 78% of boys. This kind of rapid change cannot be said to have been recorded in matters of supernaturality. It is even interesting that attitude to gender is the only of the four indicators of traditional orientation which yielded an inverse relationship with forest mystification, suggesting that attitude to gender and forest mystification traverse opposing directions. It appears that the character of attitude to gender is modernistic while that of forest mystification is traditionalistic in the study area. Hence, modernistic attitude to gender is not deterring of traditional attitude to the forest.

Conclusions

There is a strong continuity in the forest culture of mystification in the study area. This bares the popularity of supernaturality and eco-humanism thereby standing in favour of solidarity to traditional African orientation as opposed to the modern orientation. Age, religion and ethnicity are not significantly relevant in matters of forest mystification. Forest cultural survival transcends divisions along age, religion and ethnic affinities. Being male as opposed to being female, and having reduced

education rather than otherwise are significantly predisposing to holding a greater extent of forest mystification. The greater the extent to which people are traditional in their outlook to ageing, the greater the extent to which they are zealous about their culture, then the greater is the degree of their forest mystification. In contrast, attitude to religion and attitude to gender are indeterminate of forest mystification.

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Appendix

TRADITIONAL ORIENTATION AND FOREST MYSTIFICATION: A STUDY AMONG RURAL DWELLERS OF ONIGAMBARI FOREST RESERVE OF OYO STATE NIGERIA

Dear Respondent,

I represent a group of researchers at the Federal College of Forestry, Forestry Research Institute of Nigeria, Ibadan, working on the above-named project. The aim of the research is to understand differential attitudes associated with forests in communities around Onigambari forest reserve. Your anonymity is highly guaranteed. This means that your responses will not be traced back to you, your name or any other means of identification. The estimated number of participants is one hundred and ninety. This means that you and 189 other people will be required to respond to this questionnaire. This should not take more than 25 minutes. Your contribution will go a long way in helping to generate information about the study.

Thank you very much for your cooperation.

Dr. (Mrs.) F. M. Ibrahim 08055822100

Instructions:

- Please answer the questions from your own perspective. It is about you, not someone else.
- Express your own personal views and not those prevalent in the society.
- Please feel free to provide true information, this is only an academic exercise.
- Nobody can challenge you about your responses.
- Tick your response like this √. Thank you very much for your cooperation. God bless you.

1	Age [*Please write your specific age*]	_____	2	Marital Status	Single _____ 1 Married_____ 2 Divorced _____ 3 Widowed_____ 4
3	Highest educational qualification [*Please select your highest educational qualification*]	No formal education 1 Primary school cert. 2 Secondary school cert. 3 NCE/OND/HSC/A Level 4 B.Sc./HND 5` Postgraduate Diploma 6 Masters degree 7 Doctorate (PhD) 8	4	Religion	Islam _____ 1 Christianity____ 2 Traditional _____ 3 Others_____ *[Please state it]*
5	Ethnicity	Yoruba _____ 1 Igbo _____ 2 Hausa_____ 3 others _____ *[Please state it]*	6	Sex	Male _____ 1 Female ___ 2
7	Employment (*You may select more than one option*)	Unemployed 1 Farming 2 Trader 3 Artisan 4 Civil servant 5 Student 6 Others _____ [*Please specify*]	8	Age	16–25 _____ 1 26–35 _____ 2 36–45 _____ 3 46–55 _____ 4 56–65 _____ 5 66–above ___6

ATTITUDE TO GENDER
Kindly indicate how well you agree with these statements. Provide only one response (√) for each statement

	CODE	ITEMS	RESPONSES			
9	ATG1	A father's major responsibility is to provide financially for his children	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
10	ATG2	Men are more sexual than women	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
11	ATG3	Some types of work are just not appropriate for women	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
12	ATG4	Mothers should make most decisions about how children are brought up	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
13	ATG5	Mothers should work only if necessary	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
14	ATG6	Girls should be protected and watched over more than boys	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
15	ATG7	Only some types of work are appropriate for both men and women	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
16	ATG8	For many important jobs, it is better to choose men instead of women	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]

ATTITUDES TO AGEING
Kindly indicate how well these statements are correct. Provide only one response (√) for each statement

	CODE	ITEMS	RESPONSES		
17	ATA1	As people get older, they are better able to cope with life	Totally true[2]	Fairly true[1]	Not true at all[0]
18	ATA2	Wisdom comes with age	Totally true[2]	Fairly true[1]	Not true at all[0]
19	ATA3	There are many pleasant things about growing older	Totally true[2]	Fairly true[1]	Not true at all[0]
20	ATA4	I am more accepting of myself as I have grown older	Totally true[2]	Fairly true[1]	Not true at all[0]

ATTITUDES TO RELIGION
Kindly indicate how well these statements are true. Please provide only one response (√) for each item

	CODE	ITEMS	RESPONSES		
21	ATR1	I seek God's help	Totally true[2]	Fairly true[1]	Not true at all[0]
22	ATR2	I put my trust in God	Totally true[2]	Fairly true[1]	Not true at all[0]
23	ATR3	I try to find comfort in my religion	Totally true[2]	Fairly true[1]	Not true at all[0]
24	ATR4	I pray more than usual	Totally true[2]	Fairly true[1]	Not true at all[0]

CULTURAL ENTHUSIASM
How truly do these statements apply to you? Kindly avoid sharing opinions with anyone. Please, kindly respond to the questionnaire carefully

	CODE	ITEM	RESPONSES		
25	COR1	I am proud of my culture	Totally true[2]	Fairly true[1]	Not true at all[0]
26	COR2	Respect for tradition is important for me	Totally true[2]	Fairly true[1]	Not true at all[0]
27	COR3	I value a strong link to my past	Totally true[0]	Fairly true[1]	Not true at all[2]
28	COR4	Traditional values are important for me	Totally true[0]	Fairly true[1]	Not true at all[2]

FOREST MYSTIFICATION
Kindly indicate how well you agree with these statements. Provide only one response (√) for each statement

	CODE	ITEMS	RESPONSES			
29	MYS1	Forest is not just the habitat of flora and fauna but also of spirits	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
30	MYS2	Special creations that are neither humans nor animals are there in forests	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
31	MYS3	There are creations in the forest that cannot be seen with ordinary eyes	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
32	MYS4	Trees like *irókò* can provide directions to hunters in the forest	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
33	MYS5	There is no deity (orisa) that does not have connection with forest	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
34	MYS6	There are some animals in forests that are actually spiritual and should not be consumed	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]
35	MYS7	There are mysterious trees in forests	Strongly agree[4]	Agree[3]	Disagree[2]	Strongly Disagree[1]

SPIRITUALITY
Kindly indicate how well these statements are true. Kindly respond to this questionnaire carefully

	CODE	ITEMS	RESPONSES		
36	ATS1	I am convinced of a rebirth of man (or his soul)	Totally true[2]	Fairly true[1]	Not true at all[0]
37	ATS2	I am convinced of existence of higher powers and beings	Totally true[2]	Fairly true[1]	Not true at all[0]
38	ATS3	I am convinced that soul has his origin in a higher dimension	Totally true[2]	Fairly true[1]	Not true at all[0]
39	ATS4	I am convinced that man is a spiritual being	Totally true[2]	Fairly true[1]	Not true at all[0]

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BOOK REVIEW

Daria Dubovka (2020). V monastyr' s mirom. V poiskakh svetskikh kornei sovremennoi dukhovnosti [To the Monastery in Peace: Searching for Secular Origins of Contemporary Spirituality]. EUSP Press

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This book was published by the European University in Saint Petersburg, which is one of the leading research universities in Russia. It is authored by Daria Dubovka, the European University graduate, who studied under J. Kormina and S. Shtyrkov, leading Russian scholars in anthropology of religion, and it is written after extensive fieldwork in Russian monasteries. This cover information would promise an exciting read and no reader will indeed be disappointed. But what captured my attention from the first lines of the book was the pristine personal voice of the author who engages her readers in a candid conversation and erudite reflection about what it means to be a devout Orthodox Christian today.

While starting with criticizing essentialization of distinction between secular and religious spheres and of "othering" religious individuals, Dubovka strives to formulate and to practice the methodology that would allow scholars of religion to describe inner transformation that individuals undergo in the monasteries without either yielding to Christian—"native"—categories or reducing personal religious experience to external factors and structures (see p. 20). This quest for methodology is, in essence, spurred by the question about the agency of religious individuals and, as Dubovka defined her intention in the *Conclusion*, can be equated with "practical theology" (p. 185).

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The study is based on participant observation in a number of Russian convents during longer periods of time over several years and on the interviews with their inhabitants—from abbesses to pilgrims and tourists. Given severe conditions of monastic life and lower status of temporary laborer, assumed by Dubovka, on top of gender inequality in the Orthodox milieu, this ethnographic research is an outstanding achievement and fully merited its praise from "official opponents" during the Dissertation defense at the Museum of Anthropology and Ethnography (*Kunstkamera*) in 2017. However, while sympathetic of the practical challenges this fieldwork caused to the author it is for the intellectual challenges Dubovka poses before the reader that I admire her study.

The first two chapters take us from history and brief description of the current socio-economic state of Orthodox monasteries to the ascetic practices that are exercised there. Late Soviet fascination with Russian national tradition as well as disenchantment with Communist ideology paved the way for the restoration of religious monuments and revival of religious communities after the collapse of the USSR. Both trends coalesced around resuscitating historical Russian monasteries such as Goritsy Monastery, or Goritsy Convent (*Воскресенский Горицкий монастырь*), whose architectural complex survived the Soviet atheism—mostly in a deplorable state, though. Yet, material circumstances of bringing religious life back to dilapidated buildings limited rigidly what kind of spiritual exercises can be practiced.

Priorities in resource distribution were given to sacred spaces such as Churches and to survival infrastructure such as silos, cattle folds and farms. Living quarters are the last to be renovated and there is next to nothing that remains to be allocated for installing modern sanitary facilities such as hot water supply and canalisation. While patristic ideal showcases incorporeality of monastic body, which is likened to angelic nature, and calls for transcending all the needs of the flesh, "of all the ascetic practices dealing directly with the body, the monasteries of today can afford only restrictions on hygienic habits of modern women" (p. 72, my translation from Russian—A. M.). As Dubovka emphasises,

> despite the proclaimed monastic ideal, which seeks to transform human being into bodiless spirit, it is in the monasteries where a sweating and grimy body found its legitimate haven… In turn, this unwashed body helps to maintain asocial monastic community, where relationship with God is superior to relationships with fellow humans. (pp. 76–77, my translation from Russian—A. M.)

Another limitation stemming from socio-economic conditions of the monasteries at present is the dire need for labor, mostly unskilled and routine labor. Since monasteries can rarely afford hired professionals, they have to employ for their chores the unpaid temporary laborers who come to the monasteries with their spiritual needs. Temporary laborers are willing to exchange their manual labor for the spiritual rewards such as spiritual guidance, prayers on their behalf, atonement, etc. But both permanent and temporary inhabitants of the monasteries who have to work for the monasteries' survival feel that "labor has become the opposite of prayer (*антонимом молитвенной деятельности*) in modern monasteries" (p. 82, my translation from Russian—A. M.). In this case, "prayer"

refers to hesychastic practice of spiritual contemplation and repetition of Jesus Prayer, which requires intense concentration and withdrawal from the mundane. However,

> while most inhabitants seek special religious experience, the monastery can guarantee only an ordinary routine of labor. Consequently, monks and laborers face a complicated task of transfiguring their labor such as peeling potatoes, watering gardens, and washing windows, into a source of spiritual experience (p. 95, my translation from Russian—A. M.).

Whereas the first chapters dealt with current socio-economic situation of the monasteries and ensuing restraints on ascetic experience, the third chapter aims at "demonstrating that current monastic practices of self-transformation (*практики работы над собой*) originated in recent Soviet past rather than having ahistorical or pre-revolutionary provenance" (p. 37, my translation from Russian—A. M.). Unlike patristic examples of asceticism, in which humility was achieved by subverting social decorum, modern humility is cultivated by the very organisation of labor in the monasteries rather than by engaging in an unbefitting labor. Labor is organised in a way that challenges people's innate moral intuitions, for instance, by subordinating older persons to the younger or assigning physical labor to those who come to the monastery in the hope of hesychastic contemplation. The inhabitants have to devise ways to spiritualise their everyday existence in the monastery because there is little else available to them in their search for spiritual transformation (see pp. 100–101). The monasteries reenforce this reinterpretation of the everyday labor by "institutionalising the practice of obedience (*послушание*)" (p. 117, my translation from Russian—A. M.). The notion of "obedience" refers to specific labor tasks assigned by the superiors. By using this moral notion to describe routine labor operations the inhabitants reimagine their chores as spiritual exercises. As Dubovka summarises,

> as a current response to the fundamental paradox of monasticism—how can one be bodiless while having a body?—contemporary nuns strive to achieve robotisation (desirable even if unattainable) of the body rather than to subjugate the flesh with fasting and chains. Obedient body – a mechanism for labor operations—is also best suited for simple manual work, which is required in contemporary nunnery (p. 119, my translation from Russian—A. M.).

Both strategies of conceptualising spiritual transformation in modern monasteries – robotisation through "obediences" assigned in everyday labor rather than virtue exercises and prayerful contemplation underpinned by new-age "energy" imaginary rather than traditional hesychasm—can be explained, in Dubovka's view, by the Soviet cultural legacy that current inhabitants bring with them to the monasteries.

In the fourth chapter, D. Dubovka points out that

> after some time, tough, those who come to the monastery to work on their selves (*нацеленные на работу над собой насельники*) have to acknowledge that

> current monastic view on human nature cannot be wedded to the techniques of self transformation, couched in the metaphor of progress[…] those who came with the hope of achieving progress in spiritual work by systematic exercises find themselves at a dead end (pp. 141–142 my translation from Russian—A. M.).

Thus, the question of agency of religious individuals arises. Whereas Saba Mahmood criticised secular notion of agency as resistance to any authority and argued for religious agency, which could be expressed in a voluntary obedience to the chosen authority, Dubovka insists that "these two notions of agency are no longer impervious to each other" (p. 124, my translation from Russian—A. M.). Modern religious individuals are never immune to doubt or to alternative interpretations of their monastic experience. When the monastery cannot adequately satisfy the spiritual needs of its inhabitants because its routine flattens the ladder envisioned by John Climacus and locks the inmates up in the recurrency of tedious labor, religious individuals can abandon the monastery. But their choice is not limited to religiosity in the monastery or secularism beyond its walls. They can remain religious and pursue their religious quest of self-transformation. Moreover, they can argue that their religious experience is more under their control and can be better cultivated outside the monastery. Thus, if we rely on longitudinal observation in our assessment of agency, we will need to re-conceptualise the opposition between secular and religious agency and extend S. Mahmood's notion of religious agency.

In the final chapter, Dubovka analyses the case of charismatic leadership. In a charismatic community, spiritual gifts are bestowed on the elder—community leader—and only through him can be transmitted to other individuals. Besides, these exclusive gifts of the elder include clairvoyance. Therefore, "ritual communication cannot be separated from everyday communication; consequently, any conversation can be interpreted in a sacred register" (p. 170, my translation from Russian—A. M.). Thus, "in Nikolskoye, interpretation has become the key to reproducing charismatic authority" (p. 176, my translation from Russian—A. M.), as the community members constantly convince themselves and their fellows in their leader's clairvoyance by interpreting—with the benefit of hindsight—any of his utterances as prophetic. This confidence in the leader's divine grace allows the members to defer all responsibility for their lives to the purview of their leader.

In the previous chapters, Dubovka demonstrated how robotisation through manual labor in obediences and energy manipulation in prayerful contemplation reflect, respectively, organisational and mystical aspects of modern religious experience. However, in the charismatic community, another—communicative aspect—comes to the fore. Thus, the question of religious agency devolves to the question of how the practice of interpretation is performed by the religious individuals in specific circumstances. The latter question can only get an adequate reply on the basis of empirical research, or to be precise on the basis of ethnographic methods. Daria Dubovka's book is a brilliant example of empirically grounded and theoretically rich study of modern religiosity in Russia.

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Database	Author, A. A., Author, B. B., & Author, A. A. (2002). A study of enjoyment of peas. *Journal Title*, 8(3). Retrieved February 20, 2003, from the PsycARTICLES database.
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