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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.

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- 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;
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Special Issue: **Demographic Well-Being as a Factor of Social Development**

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EDITORIAL

Demographic Processes in the Context of Demographic Well-Being

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Demographic well-being is a relatively recent concept, applicable at both individual and societal levels, ranging from interpersonal relationships to larger entities such as countries, regions, or territories. At the individual level, demographic well-being is associated with the adoption of reproductive and life-sustaining strategies that result in satisfaction with one's quality of life. At the societal level, it corresponds to positive and enduring demographic trends, reflected in optimal population reproduction and a balanced age–gender structure. These trends are intricately influenced by sociocultural, regional, and ethno-religious factors in a given social context. Additionally, demographic variables such as age, gender, marital status, and education have considerable influence on subjective perceptions of quality of life, shaping how individuals evaluate their physical, mental, and social well-being.

Renowned Russian demographer Sergei V. Ryazantsev offers a more nuanced perspective on the concept of demographic well-being. He suggests looking at it from two perspectives: on the microlevel, from the individual perspective, demographic well-being revolves around achieving life satisfaction through pursuits like marriage, reproduction, and migration, leading to desired physical, mental, social, and economic states for both the individual and the family. On the macro level, that is, on the level of a country or territory (region, area), demographic well-being can be seen as the harmonious interaction between quantitative and qualitative indicators of demographic development over at least a five-year period (Ryazantsev & Miryazov, 2021).

Demographic well-being partly intersects with the concepts of demographic resilience and demographic stability (for more on this see Rostovskaya & Sitkovskiy, 2024).

In turn, demographic resilience is closely linked with another crucial concept, that is demographic sustainability. Within the context of sustainable development,

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the United Nations Population Fund (UNFPA) defines demographic resilience as a goal that includes the ability to predict demographic shifts, understand their implications, and develop policy measures based on factual data considering human rights. This means transitioning from narrow approaches focused solely on population size to a comprehensive demographic and social policy aimed at ensuring prosperity and well-being for all (Programma, 2022). This suggests that demographic sustainability is a primary objective of state demographic policy, particularly in nations experiencing depopulation. A similar perspective is upheld by leading international scholars, who view demographic sustainability as the inherent capability of populations to withstand and recover from shocks (Capdevila et al., 2020).

Another international compilation highlights that demographic resilience embodies a country's (or region's) capacity to maintain both quantitative and qualitative reproduction of demographic structures in distinct historical, socio-economic, legal, and environmental contexts (Nikolaiets et al., 2023). Moreover, demographic resilience is also defined as the capacity to maintain a sustained trajectory of population growth over the long term (Colantoni et al., 2020).

Demographic stability is also a comparatively new concept introduced by Tamara K. Rostovskaya and Olga A. Zolotareva in 2022:

Recognizing the peculiarities and specifics of demography as both a science and a practice, the following interpretation of the concept of "demographic stability" can be presented. Demographic stability entails the establishment of qualitative and quantitative characteristics of marital, reproductive, self-preservation, and migratory parameters that foster a stable state and development of demographic processes, ensuring natural population reproduction at a level aligned with the national interests. (Rostovskaya & Zolotareva, 2022; Trans. by Ekaterina Purgina)

The suggested definition of demographic stability highlights a fundamental connection between demographic processes in a given country and the preservation of its integrity, independence, and sovereignty. It emphasizes the steadfast objective of maintaining and, where possible, improving the state's current status across its diverse operations.

This themed issue of the journal *Changing Societies & Personalities* presents various perspectives on demographic processes, with a focus on demographic well-being as a central element of social development. The current issue, dedicated to the Year of the Family in the Russian Federation, highlights aspects of the family institution and birth rates.

The team of contributors, consisting of prominent Russian demographers, addresses a range of aspects, including:

- demographic processes and national security;
- demographic well-being at both macro and microlevels;
- the role of large families in demographic development;
- dynamics of birth rates and mortality, alongside their socio-cultural influences;
- directions of migration policy.

According to current Russian legislation, the primary goal of state policies is to boost birth rates and incentivize young people to have more children, which reflects the national priority to support large families, especially in light of global challenges and internal threats to depopulation.

The themed issue begins with an article titled *Institutional Factors in Reproductive Decision-Making Among Large Families in Russia* by Tamara K. Rostovskaya, Olga V. Kuchmaeva, and Ekaterina N. Vasilieva. Recognizing demographic well-being as a fundamental component of national security, the authors emphasize the importance of research on institutional conditions that influence well-being in large families.

In 2007, Tamara Rostovskaya spearheaded the development of a model aimed at fostering the well-being of families. The model is aligned with *Kontseptsiiia gosudarstvennoi politiki v otnoshenii molodoi sem'i* [Concept of State Support for Young Families] (O Kontseptsii, 2007) and encompasses the following parameters of well-being:

1. *Demographic parameters*: complete family, legitimate marriage (in Russia, officially registered marriage is recognized only between a man and a woman), presence of children, functional connections with parental families and other relatives;
2. *Values*: family and children, health, trust, love, respect, understanding, care;
3. *Living conditions and financial security*: comfortable housing, provision of family members' needs, quality education and healthcare, opportunities for leisure;
4. *Socio-psychological parameters*: absence of harmful habits, dependencies, adherence to laws, warm trusting relationships between spouses, involved parenting, respect between parents and children.

Socio-demographic policies should address the aforementioned aspects to safeguard the well-being of large families. An important legislative step in this regard was the Decree of the President of Russian Federation No. 63 outlining social support measures and legal status for large families (O merakh sotsial'noi podderzhki, 2024).

Articles presented in this special issue explore institutional factors shaping large family dynamics, trends in the structure of young Russian families, motivations for having many children, life in large families, and their satisfaction with state policies. Empirical evidence is drawn from various sources including national censuses (with a particular focus on the All-Russian Population Census 2020), the extensive national survey *Demograficheskoe samochuvstvie regionov Rossii* [Demographic Well-Being of the Regions of Russia] conducted in 2021, in-depth interviews with parents of multiple children across 10 Russian regions, expert surveys with government representatives responsible for family policies, and a study on “student families” conducted in 2022. Based on these data, the studies offer recommendations for demographic policy tools to enhance family reproductive potential, covering stages from the birth of the first child to planning subsequent children. Additionally, the research suggests that policymakers should prioritize support for large families, as is it the well-being of such families that significantly influences population growth in Russia.

The article by Vladimir N. Arkhangel'skiy, Svetlana Yu. Sivoplyasova, and Evgeniya M. Moiseeva *Exploring Fertility Dynamics and Factors Shaping Russia's Demographic Prospects* explores Russia's current depopulation trend, offering a detailed analysis of birth rate patterns. Using current birth rate calendar indicators alongside data from the

All-Russian Population Census 2020, the authors examine trends in real generations. Compared to traditional population census methods, this approach employs one-year age coefficients and provides us with a deeper understanding of age-specific fertility dynamics. The study examines several factors that influence fertility, such as demographic shifts and marriage rates. It draws on both statistical analysis and sociological surveys conducted by Rosstat [Federal State Statistics Service] and the Institute for Demographic Research—Branch of the Federal Center of Theoretical and Applied Sociology of the Russian Academy of Sciences. Furthermore, the article evaluates the fertility level needed to offset natural population decline in Russia and describes potential strategies to increase fertility rates.

The article by Elmira K. Naberushkina, Olga E. Fomina, Anna D. Levshits, and Ekaterina A. Knyazkova *Social Profile of Mothers Raising Children With Disabilities: A Survey in Rural and Small-Town Russia* highlights the specific challenges faced by women raising children with disabilities. In their research conducted in 2024, the authors focus on women residing in provincial towns of Vladimir and Nizhny Novgorod Oblasts. The study provides a detailed sociological profile of these women, encompassing such demographic characteristics as age, marital status, number of children, standard of living, financial situation, housing conditions, educational background, employment status, and personal interests. The study provides valuable insights into various aspects of these mothers' lives, including their overall life satisfaction, levels of support from the state and society, and the stigma associated with raising disabled children. The study also emphasizes the challenges faced by families raising disabled children in different spheres, spanning education, healthcare, social support, rehabilitation services, access to cultural and recreational activities, psychological and pedagogical assistance.

Anna P. Bagirova, Natalia D. Blednova, and Aleksandr V. Neshataev in the article "*Who if Not a Mother?": Development of Parental Leave Design in Russia* showcase the need to establish a more systematic approach to parental leave policy. Even though in Russia not only mothers but also fathers or other relatives may take advantage of childcare leave, statistics reveal that only 2% of fathers opt for parental leave instead of their spouses, which points to a significant disparity. To probe into the reasons behind this phenomenon, the authors conducted a series of in-depth semi-structured interviews with both mothers and fathers eligible for childcare leave at the time of the study ($n = 30$). Among other factors, women themselves often indicate their reluctance to relinquish their role as the primary caregivers. The reasons were classified as objective and subjective, reflecting entrenched gender stereotypes from both male and female perspectives. The research highlights the need for reevaluating and reshaping the current parental leave system in Russia, alongside targeted efforts to alter public opinion on this matter.

One of the most discussed topics in Russian demographic literature is the regional variation in mortality and the quest to uncover its determinants, which is necessary to develop effective policies for addressing regional disparities. In this context, the significance of the article by Alla E. Ivanova, Victoria G. Semyonova, Tamara P. Sabgayda, and Elena V. Polyanskaya *Regional Differences in Life Expectancy in Russia Through*

the Lens of Epidemiological Transition becomes apparent. To deal with depopulation and potential labor shortages, it is crucial to reduce premature mortality rates, which will also alleviate socio-demographic costs associated with factors like marriage dissolution due to widowhood and the increasing number of incomplete families.

Although the concept of epidemiological transition primarily describes the historical periodization of mortality, its fundamental methodological principles remain highly relevant for understanding current regional mortality differentials. The wide variation in life expectancy among Russian regions, amounting to a 16-year gap, signifies a disparity in the epidemiological era, characterized by fundamentally distinct age-specific and nosological mortality patterns and their underlying determinants. With the help of a classification system developed for Russian regions based on factors such as age-related life expectancy losses and the main causes of death in various age groups, the study identifies the key factors that affect mortality rates in these groups.

The concluding article by Galina I. Osadchaya, Tatyana N. Yudina, Olga A. Volkova, and Egor Yu. Kireev *Migrants From Central Asia in the Moscow Agglomeration: Social Well-Being and Demographic Attitudes* relies on findings from a 2023 survey conducted among Central Asian migrants living and working in Moscow. The article sheds light on various demographic attitudes and social well-being among migrants and builds their profile, encompassing marital status, fertility, reproductive and migration behaviors, values orientation, job satisfaction, daily life satisfaction, social mood, and prospects for the realization of their life plans.

On behalf of the contributors, we extend our gratitude to the journal's editorial board for the opportunity to prepare and publish this thematic issue on issues of demographic development. We look forward to continued collaboration and are confident that the journal will persist in publishing engaging and significant research for the advancement of both scientific knowledge and social well-being.

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ARTICLE IN THE SPECIAL SECTION

Institutional Factors in Reproductive Decision-Making Among Large Families in Russia

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ABSTRACT

Amidst pressing global challenges and internal demographic threats, it is crucial to understand the institutional dynamics shaping the well-being of large families. This study delves into the intricate web of institutional factors that influence the prosperity of such families, examining key theoretical frameworks including institutional theory, human and social capital theories, and concepts of family. The empirical investigation draws upon extensive data sources, encompassing population censuses spanning five decades (1970–2020) and the comprehensive 2021 All-Russian sociological study *Demograficheskoe samochuvstvie regionov Rossii* [Demographic Well-Being of the Regions of Russia]. We conducted 22 in-depth interviews with members of large families across 10 regions. These interviews gave us a nuanced picture of the trends in family structure and the reasons behind reproductive decisions within these families. While institutional support is viewed as a “bonus” rather than a decisive factor in reproductive decisions, parents require various resources, including material, temporal, socio-psychological, informational, and

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educational resources, to develop necessary family and human capital skills. Furthermore, the study identifies the institutional conditions and resources crucial for bolstering the well-being of large families as well as the importance of effective family policies.

KEYWORDS

prosperous family, large family, family structure, reproductive behavior, institutional conditions, family policy

Introduction

A substantial body of research literature examines the motivations behind reproductive decision-making, that is, the reasons behind people's decision to have their first or second child or more children. Some argue that having more than one child, especially three or more, is not economically feasible while having one child allows the family to concentrate their resources on this child's education and upbringing to foster the growth of their human capital. Research also aims to shed light on the factors behind the decision to have a third child, suggesting that impediments such as economic downturn and social problems are leading to the decrease in the number of large families and additionally, children from larger families are more vulnerable to social risks (Desai, 1995).

An analysis of data from the Generation and Gender survey spanning 2004–2015 for Austria, Bulgaria, France, Georgia, Hungary, Poland, and Russia suggests that lower opportunity costs and positive public opinion influence third-child births (Panova et al., 2023). A Norwegian study investigated three factors influencing third-child births: the birth rate in neighboring families (social environment influence); propensity to relocate; and likelihood of living in a suitable home for a large family (Bergsvik et al., 2023).

The research aims to systematize the institutional conditions that determine families' reproductive decision-making, highlight the main trends in the evolving structure of Russian families, identify motives for reproductive behavior, and outline the necessary institutional conditions and resources contributing to the well-being of multi-child families.

The main hypothesis of the study is that to help families realize their reproductive plans, it is important to assist them in tapping into their own resources while also enhancing external support systems. This, in turn, could lead to an increase in the number of large families in Russia. The verification of this hypothesis requires the use of data from quantitative and qualitative studies of families.

Theoretical Framework

Analysis of the institutional conditions shaping large family dynamics requires us to consider both enabling and constraining factors. By applying the lens of institutional theory, we can explore how governmental regulations influence the evolution of socio-

economic structures (Abolafia & Biggart, 1991; Fligstein, 1997; Granovetter, 1992; North, 1990; Polanyi et al., 1957).

Beyond institutional conditions, it is also important to understand the values influencing reproductive behavior since these values shape individuals' interests (constitutive impact) and guide their decisions in pursuing reproductive goals (regulatory impact). To address the questions outlined above, we need to inquire into what resources are necessary for families to prevent their standard of living from declining after the birth of subsequent children. Another question is whether the model of a large family in this study corresponds to the concept of a "well-functioning family" developed by T. Rostovskaya (Rostovskaya & Kalachikova, 2022; Rostovskaya & Kuchmaeva, 2020; Rostovskaya et al., 2021, 2023).

Resources can be systematized according to the standard scheme: internal family resources such as human and social capital, values, etc. and external resources, i.e., state support through social protection institutions, regulatory documents, etc. (Coleman, 1988; Lee, 2020; Putnam, 1995; Woolcock & Narayan, 2000; etc.). While interactions with bureaucratic structures providing social support tend to be impersonal, socially oriented non-profit organizations (SO NPOs) offer more interpersonal support, fostering the accumulation of social capital. The effectiveness of resource use in families is determined by the actions, decisions, and behaviors of the family members themselves, which is why it is also essential to study the family's human capital.

At this point it should be noted that worthy of special interest for this study are the approaches that regard the family as an institution where members make rational decisions about distributing and redistributing available resources, often seeking external support (Anderson & Bidner, 2023; Deschênes et al., 2020; Dorofeeva, 2021; Pavlyutkin & Goleva, 2020). In large families, time (Goleva, 2019) and social capital play crucial roles in redistributing tasks (Dorofeeva, 2021). External family resources are accumulated in the system of state support, social protection, and medical services, which is discussed by Stuart et al. (2023), Egger and Radulescu (2012), Ilyin et al. (2021).

Economic institutions directly determine what efforts an actor needs to make to form the family's material resources. Australian and Chinese studies assess the impact of housing affordability and real estate market prices on fertility (Atalay et al., 2021; Meng et al., 2023). Additionally, the resource distribution in Russian families is discussed by Borisova and Pavlyutkin (2019), Dorofeeva (2021), and etc.

The resource potential of public organizations, civil society, and non-profit organizations is analyzed by Mersianova and Benevolenski (2016). More comprehensive research is needed, however, to understand the support provided by public organizations to large families. The question about the influence of religion on family values and reproductive behavior is also surrounded by much debate (Ildarhanova et al., 2022).

We summarized the information on the institutions and corresponding resources for large families in Table 1. We also examined the internal and external resources available to large families to gain a better understanding of how these families develop and function in modern Russia.

Table 1*Institutions That Determine the Availability of Resources to Large Families in Russia*

Institutes	Resources
Family	Human capital (social status of family members, education, experience, career, health, etc.) Material resources (income earned, housing, etc.) Social capital (multi-generation family, comprising parents, brothers and sisters, friends, colleagues) Norms and values (sustainability of parent–child relationships, etc.) Time and management resources
Education	Human capital Social capital Norms and values (traditional Russian values)
Healthcare	Support and development of human capital (availability and quality of medical care)
Economic institutions	Labor market (employment structure, regional wage levels) Development of entrepreneurship and self-employment Infrastructure, including the quality of the family's living environment (educational and sports facilities, transportation accessibility, recreational services) Real estate market
Social protection institutions	Material support (benefits, subsidies, maternity capital, discounts and free travel passes, preferential mortgage loans, tax breaks) Maintenance and development of human capital (educational programs for women with children, for children; recreation opportunities for families and children, sports)
Public opinion	Norms and values (positive, negative, or neutral attitudes towards large families)
Mass media	Information access (about state and regional support measures for large families, about the activities of public organizations, etc.) Public opinion (practices of shaping public opinion, advertising)
Religious institutions	Norms and values Accumulation of social capital through expanding social networks
Public organizations (SO NPOs)	Accumulation of social capital Time (redistribution through receipt of additional social services) Maintenance and development of human capital (educational programs for family members and children) Information access

Methodology

To identify the trends in the changing structure of the modern Russian family, in particular regarding the number of children, and to determine the prevalence of large families among urban and rural populations, data from the Russian censuses over the past 50 years have been systematized. The censuses took place in 1970, 1979, 1989, 2002, 2010, and 2020.

We analyzed the institutional conditions influencing the reproductive behavior of large families using data collected in 2021 from the second phase of the national sociological study *Demograficheskoe samochuvstvie regionov Rossii* [Demographic Well-Being of the Regions of Russia] (Project No. 20-18-00256 on the Demographic Behavior of the Population in the Context of National Security of Russia). We conducted 22 in-depth interviews across various federal districts, including the Central, Northwestern, Volga, Urals, North Caucasus, and Southern regions. Representatives of large families from urban households were selected based on specific criteria, such as income level, absence of addictions, and a healthy socio-psychological environment. These selection criteria helped us focus on the motivations and circumstances behind the decision to form large families as a deliberate and responsible choice. We used a methodology for reconstructing the family's life trajectory to explore the reproductive motivations of parents in large families.

Demographic Trends of Large Families in Russia

Despite the birth rates decreasing worldwide, the situation with large families varies significantly by country and region. Large families (that is, families with three or more children) currently (as of 2020) account for 12.6% of the total number of families with children in Europe, though this figure varies significantly. For example, Finland, Belgium, France, the Netherlands, Sweden, and Croatia had the highest proportion of households with three or more children, that is more than 15.0%. In Portugal (6.3%), Bulgaria (7.4%), Italy (8.1%), Spain (9.3%), Lithuania (9.4%), and Greece (9.8%), less than one in ten families with children could be classified as large (Stamoulis & Pierrakos, 2023).

According to the European Statistical Agency (Eurostat), there is a growing trend in the number of large families, despite the fact that the average family size is getting smaller. There are now more families with four or more children in Britain than at any time since the 1970s (OECD, n.d.). The share of large families in the United States is more than a fifth of families with children, 21.6%. In Japan this figure is 11.5% (OECD, n.d.). Families with a large number of people are still the norm in Africa and South Asia. Bangladesh, India, and Nepal have shown a slight decrease in the prevalence of large households in recent years (De Silva, 2003; Obembe et al., 2018).

Population censuses, both in Russia and elsewhere, offer crucial insights into family structures, enabling analysis of childbearing trends and the adoption of the large family model among Russians across different regions. Over the past 50 years, data shows a notable decline in the prevalence of large families and overall childbearing rates in Russia. In 1970, 214 out of 1,000 families had no children under 18; by 2020, this figure nearly tripled to 604 (Table 2). According to the latest census, only 396 out of 1,000 families had children under 18. The remaining families include those who choose not to have children, those yet to start families, or parents whose children have reached adulthood. It is crucial to recognize that the high number of childless families reflects low birth rates. For instance, if a family has only one child after 18 years, it is

categorized as childless due to the absence of children under 18 in the household, as per census methodology.

Analysis of the structure of families with children should take into account the growth—until recently—in the number of families with only one child. In 1970, there were 485 one-child families per 1,000 families with children, and by 2010, their number had increased to 655. This trend slowed down in 2010 and was replaced by a decrease, according to the 2020 census data. Between the 2010 and 2020 censuses, the indicator decreased to 552.

The 2020 census showed an increase in the proportion of families with two and three or more children, which contradicts the trends in previous decades. By 2010, the proportion of families with two children decreased to 275 per 1,000 families with children, and those with three or more children decreased to 70. Over 40 years, the reduction was 1.25 and 2.44 times, respectively. However, in 2020, the indicators practically returned to the 1979 level.

We could safely assume that the dynamics of the family structure in terms of the number of children were influenced by measures of demographic and family policy, implemented in the form of the maternal capital at the federal (since 2007) and regional levels (gradually since 2012). These support measures are designed to encourage the birth of second and subsequent children. However, the rise in the proportion of families with multiple children may be short-lived if additional large-scale measures are not implemented to strengthen family-oriented policies.

Table 2

The Structure of Families by the Number of Children Under 18, per 1,000 Private Households Consisting of Two or More People

Population	Families				
	Without children	With children	With one child	With two children	With three and more children
	1970				
Total	214	786	485	344	171
Urban	206	794	541	357	102
Rural	228	772	384	319	297
	1979				
Total	384	616	581	327	92
Urban	376	624	625	326	49
Rural	403	597	474	332	194
	1989				
Total	416	584	508	394	98
Urban	402	598	541	391	68
Rural	457	543	406	401	193

Table 2 Continued

Population	Families				
	Without children	With children	With one child	With two children	With three and more children
2002					
Total	483	517	652	282	66
Urban	489	511	700	258	42
Rural	463	537	522	347	131
2010					
Total	559	441	655	275	70
Urban	568	432	694	258	48
Rural	532	468	545	324	131
2020					
Total	604	396	552	331	117
Urban	612	388	583	327	90
Rural	578	422	466	342	192

Note. Calculated by the authors according to the results of the All-Union Population Census of 1970 (Itogi vsesoiuznoi perepisi, 1974); the All-Union Population Census of 1979 (Itogi vsesoiuznoi perepisi, 1989); the All-Union Population Census of 1989 (Kratkaia sotsial'no-demograficheskaja kharakteristika, 1991); the All-Russian Census 2002 (Chislo i sostav, 2004); the All-Russian Population Census 2010 (Rosstat, n.d.); the All-Russian Population Census 2020 (Rosstat, 2022).

During the period under consideration, urban families' childbearing level was lower than that of rural families. It should be noted that most Russian families are urban (63.6% in 1970 and 75.1% in 2020), and their lifestyle and reproductive behavior determine the demographic situation.

In a way, the trend towards the nuclearization of family life, which stands for people's reluctance to have several children, is confirmed by the increase in the number of single people in Russia, particularly significant among the urban population (Table 3). In 2020, every fifth city dweller lived alone, outside a family. Furthermore, recent years have seen a notable rise in the number of single individuals. Between 2010 and 2020, their numbers increased from 99 to 189 per 1,000, marking a 1.9-fold increase.

The key metrics for family childbearing, used in calculations based on population censuses, include the proportion of families with children, the prevalence of large families among all families with children, and the average number of children in families with children. These indicators exhibit significant variation across Russian regions. The proportion of families with three or more children ranged from 7.0% in Magadan Oblast to 52.5% in the Republic of Ingushetia in 2020. In 63 regions, the proportion of large families does not exceed 13.3%. The proportion of large families is particularly high in national autonomies, where traditions of having many children are still strong.

Table 3*Proportion of Single Persons Living Outside the Family, per 1,000 Population*

Population	Year						
	1959	1970	1979	1989	2002	2010	2020
Total	48	66	70	69	82	99	189
Urban	59	71	69	68	84	104	207
Rural	36	57	71	71	78	87	137

Note. Calculated by the authors according to the results of the 1959 All-Union Population Census of the RSFSR (Itogi vsesoiuznoi perepisi, 1963); results of the All-Union Population Census of 1970 (Itogi vsesoiuznoi perepisi naseleniia 1970 goda, 1974; Itogi vsesoiuznoi perepisi naseleniia 1979 goda, 1989); All-Union Population Census of 1989 (Kratkaia sotsial'no-demograficheskaia kharakteristika, 1991); All-Russian Census 2002 (Chislo i sostav, 2004); All-Russian Population Census 2010 (Rosstat, n.d.); All-Russian Population Census 2020 (Rosstat, 2022).

The share of families with children among all families fluctuates significantly: this indicator ranges from 31.2% in the capital to 68.9% in the Chechen Republic. In 20 regions, the share of families with children under 18 does not exceed 37.3% (Moscow, Volgograd, Ryazan, Tver, Tambov, Novgorod, Smolensk, Tula, Kursk, Saratov, Voronezh, Moscow, Nizhny Novgorod, Lipetsk, Leningrad, Belgorod, and Pskov Oblasts, Primorsky Krai, St. Petersburg, Sevastopol).

Despite significant regional variations, families with children under 18 are less represented in the European part of the country. Again, the share of families with children is higher in the national republics (Khanty-Mansi Autonomous Okrug, Yamalo-Nenets Autonomous Okrug, Republics of Buryatia, Khakassia, Altai, Dagestan, Ingushetia, Tuva, etc.).

The average number of children in families with children points to a statistically insignificant fertility of Russian families, the national average being 1.6 children. In the overwhelming majority of Russian regions, the average number of children in families with children under 18 does not exceed 1.7 children. Only in 6 republics this figure exceeds two children (Kabardino-Balkarian, Karachay-Cherkess, Chechen, Tuva, Dagestan, and Ingushetia Republics). Figure 1 shows that a similar distribution of the indicators characterizing the childbearing of families by region.

The calculation of Kendall's tau-b rank correlation coefficient revealed significant relationships between the following indicators (the correlation is significant at .01):

- the proportion of families with multiple children among all families with children and the proportion of families with children among all families (Kendall's tau-b value is 0.576);
- the proportion of families with children among all families and the average number of children under 18 per family with children (Kendall's tau-b value is 0.603);
- the average number of children under 18 per family with children and the proportion of families with multiple children among all families with children (Kendall's tau-b value is 0.832).

Figure 1
Distribution of Families by Number of Children Across Russian Regions: Insights From the 2020 All-Russian Population Census

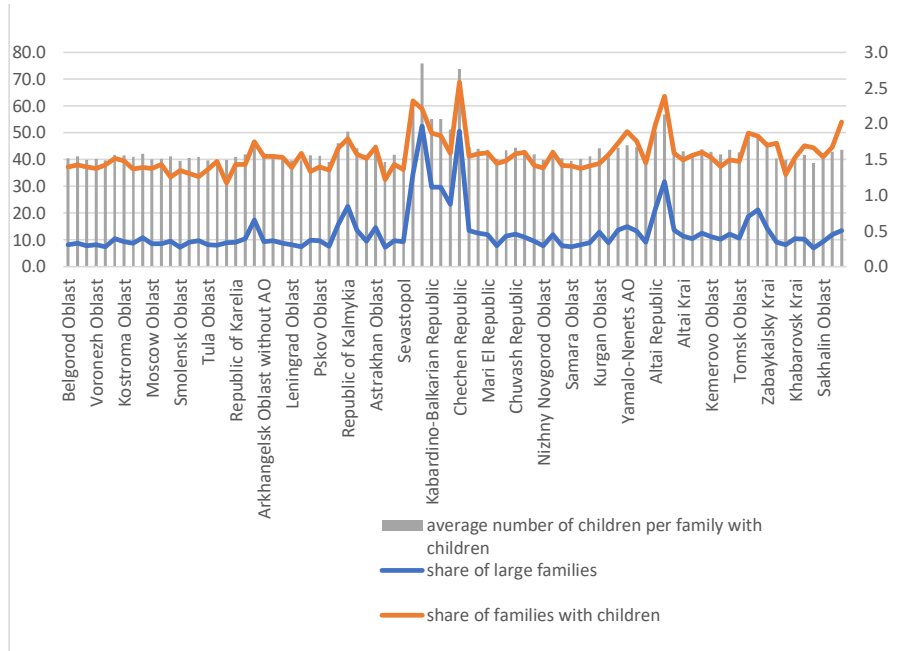


Table 4 illustrates the proportion of families with multiple children across various types of households, indicating significant variation among them. Notably, families with many children are more typical of rural rather than urban areas. Families with three or more children are most frequently found among multi-generational families, which can be explained by the prevalence of a more traditional approach to the organization of family life.

Table 4
The Number of Children in Various Types of Households in Russia According to the All-Russian Population Census 2020, %

Household	Proportion of households with children under 18				Average number of children, people
	Total	With one child	With two children	With three or more children	
Couple with or without children	41.6	48.4	38.4	13.2	1.69
Couple with or without children and living with one of the spouses' parents	54.6	49.0	37.0	14.0	1.69
Couple with or without children and living with both parents of one of the spouses with or without children	71.6	45.5	37.3	17.2	1.78

Table 4 Continued

Household	Proportion of households with children under 18				Average number of children, people
	Total	With one child	With two children	With three or more children	
Couple with or without children and living with both parents of one of the spouses with or without children and other relatives (or without them) and non-relatives (or without them)	72.6	35.6	31.7	32.7	2.23
Three or more couples living with relatives (or without them) and non-relatives (or without them)	80.2	16.8	21.7	61.5	3.44
Mother with child/children	46.0	64.5	27.4	8.1	1.46
Father with child/children	45.4	71.9	22.5	5.6	1.35
Mother (or father) with child (children) and living with one of the mother's (father's) parents	71.9	73.5	21.8	4.7	1.32
Mother (or father) with child (children) and living with one of the mother's (father's) parents, and other relatives (or without them) and non-relatives (or without them)	61.1	62.4	26.6	11.0	1.54

The highest proportion of large families, encompassing three or more married couples, relatives (or none), and non-relatives (or none), stands at 61.4%. Following closely are families consisting of a married couple with children, both parents of one spouse with or without children, as well as other relatives (or none) and non-relatives (or none), comprising 32.7%. These family types also exhibit the highest fertility rates, with 3.44 and 2.23 children under 18 per family, respectively.

However, it is worth noting that the proportion of such families in the total number of families in Russia is small and amounted to about 1.7%, according to the 2021 census data.

The most common type of family with children in Russia is the nuclear family, consisting of parents and children (48.6%). Its contribution to the fertility of Russian families determines the model of the Russian family with children. Within this category, only 13.2% of families have three or more children, leading to an average fertility rate of 1.69 children per family with children under 18.

In Russia, the proportion of incomplete families is significant, standing at 25.3%, and this figure continues to rise. In 1970, their share was 15.9%, increasing to 21.0% by 2010. These families exhibit the lowest fertility levels and the smallest share of large families, ranging from 4.7% to 11.0%.

Information about family units confirms the changing family structure. A family unit can be a married couple with or without children, a mother with children, or a father with children. In Russia, data on family units have been collected and published since 2002, which limits the analysis of long-term trends. Among family units, the majority (according to the 2020 census) are married couples (68.2%). At the same

time, only 39.4% of married couples had children under 18. Of family units, 26.0% were mothers with children, 5.8% were fathers with children. The childbearing rate of married couples is higher than that of single-parent families. According to the 2020 census, 13.5% of married couples with children could be classified as having many children. As many as 7.1% of mothers in single-parent families and 5.3% of fathers have many children. The analysis of data indicates a decrease in the prevalence of large families in Russia, reflecting global trends in family transformation such as the increasing prominence of nuclear families, declining fertility rates, and the diverse array of preferred family models.

Moreover, if we examine the structure of Russian families by the number of children, we will see a potential impact of demographic policy interventions on the proportion of large families. An essential objective for our research is therefore to understand the perspectives of members of large families regarding their reproductive motivations and the support they need to realize their reproductive plans. This aspect is crucial for developing effective family and demographic policies.

Motivations Behind Reproductive Decision-Making in Large Families

During in-depth interviews, respondents connected their values, such as family, health, material well-being, and others, with the concept of “happiness”: “It’s hard for me to talk about this, but probably family, children, grandchildren” (Female, 45, Moscow, three children; Trans. by Tamara Rostovskaya, Oksana Kuchmaeva, & Ekaterina Vasilieva—T. R., O. K., & E. V.). “To have sufficient means in the family. So that the children are as well-dressed and well-shod as everyone else, to try to take them somewhere for vacations, so that the children are happy” (Female, 35, Ivanovo Oblast, three children; Trans. by T. R., O. K., & E. V.).

The study found that family and health are integral to the concept of happiness and serve as key motivators for having many children. However, with few exceptions, there were some discrepancies in the reproductive plans between spouses, as one partner often desired to have many children while the other did not, or vice versa.

Respondent: No, we did not discuss [the number of children], but Dina wanted a large family since childhood. As they say, she got what she was asking for. At the time when Arthur was born, we were living with my parents.

Interviewer: Despite the challenges, did you opt for decisions that prioritized having children?

Respondent: It was more for the sake of my wife’s health. Abortions have negative consequences. (Male, 36, Bashkortostan, three children; Trans. by T. R., O. K., & E. V.)

I never thought about having a large family. Honestly, I thought about having one or two children. I was more inclined towards having one child. ... My husband was inclined towards having a larger family. He talked about having three children. (Female, 35, Volgograd Oblast, three children; Trans. by T. R., O. K., & E. V.)

Psychological factors influence reproductive decision-making: “It’s a very good thing to have many children, their laughter is contagious. You come home tired from

work, and the first, second, and third child kiss you, and there's no more tiredness" (Female, 35, Ivanovo Oblast, three children; Trans. by T. R., O. K., & E. V.).

Religious motives are also important: "My wife had doubts, but I firmly said, yes, we should have a third child. So, we will do as it is said [*gesturing upwards*], and it will be so" (Male, 40, Sverdlovsk Oblast, three children, the respondent himself is or was the elder of two children to his parents; Trans. by T. R., O. K., & E. V.).

One more reason is the compensation of the loneliness of only children, which allows formulating hypotheses within the theory of human and social capitals about the necessity of internal resources for the implementation of the multi-child model.

I don't know, I've always thought, the more, the better. Because I am alone in my family. We are few here, and we have no relatives, so I think that, in a way, children are the future, and the more of them, the better. They will also have children, and the family line will continue. (Male, 31, three children, wife is pregnant with their fourth child, Bashkortostan; Trans. by T. R., O. K., & E. V.)

Yes, my mother says that since childhood I have said that I would have many children, apparently, I was bored being alone. (Female, 43, Bashkortostan, four children; Trans. by T. R., O. K., & E. V.)

The parents' scenario of having many children is reproduced.

It's like this: my parents were also from large families. My dad had five brothers, and there were three children in my mom's family: my mom, her sister, and her brother. I suppose there's a genetic predisposition for parents from large families to continue ... By the way, my spouse's mom is also from a large family: four or five ... We are all from large families ... This lineage of ours continues with having many children (Male, 40 years old, Sverdlovsk Oblast, three children, the respondent himself is or was the elder of two children to his parents; Trans. by T. R., O. K., & E. V.).

Evaluation of Institutional Factors Impacting the Functioning of Large Families

Most of our respondents expressed positive attitudes towards state socio-demographic policies and regional support measures. However, they also indicated issues related to receiving assistance, including the negative public opinion towards large families.

Parents with multiple children observed that getting support often involves dealing with lengthy and complex procedures: "Yes, we received governor's payments and small payments from social security, also [payments for children] from three to seven years. But there are constant problems with registration, etc." (Male, 31, Stavropol Krai, 3 children; Trans. by T. R., O. K., & E. V.).

Respondents also note a negative attitude from government officials:

Once, when I had five of them [children], I went to the head of the city, they didn't even let me into his doorstep, they said: "You will have more children, and we will give you

cars?” That was enough, it’s enough for me to hear something once, I understand. (Female, 39, Stavropol Krai, seven children; Trans. by T. R., O. K., & E. V.)

Parents with many children also mention difficulties in using land plots due to the lack of infrastructure and communications, and funds for construction: “But the land, it exists, of course, many thanks to the state for it. But no infrastructure, no communications ... How to live there, how to build there?” (Female, 43, Tatarstan, three children; Trans. by T. R., O. K., & E. V.)

Public opinion towards large families is different. According to our respondents, people generally have a positive attitude towards large families, viewing them as normal as long as they manage well on their own and are functioning effectively:

I noticed that most people are still very skeptical about having many children, i.e., initially they believe that these are antisocial, drinking, low-income families. Since we are not like that, looking at us, as I see it, many people feel admiration: “You are so great, your kids are so cool, you should give birth to more children, there should be more of people like you” ... We also have many friends. (Female, 42, Vologda Oblast, four children; Trans. by T. R., O. K., & E. V.)

Well, I won’t say that it happens often, but I’ve had situations like this, when they say, “Why do you, idiots, have to give birth so much?!” Yes, in our time it is generally impossible to have so many children. (Female, 33, Vologda Oblast, four children; Trans. by T. R., O. K., & E. V.)

Our family is perceived wonderfully because we invested our best in our children: tutors, trips, sports, schools, including abroad. (Female, 45, Moscow, three children; Trans. by T. R., O. K., & E. V.)

They treat us well, we are friends with our neighbors. Whenever we mention our four children, they often comment “Such great kids!” (Female, 35, Ivanovo Oblast, the respondent and her current husband have two children together and are also raising their respective daughters from previous marriages; Trans. by T. R., O. K., & E. V.)

According to our respondents, people, however, do not consider access to government assistance as a robust reason for having another child:

We did not have kids because someone would give us something. We had them because we wanted our children, that’s all. (Male, 45, Tatarstan, three children; Trans. by T. R., O. K., & E. V.)

You know, there is not much support there, that is, we cannot, for example, even count on being given land. Therefore, there was no reason at all. If they give something, it’s good, if not, well, we won’t die of hunger either. (Female, 34, Nizhny Novgorod Oblast, three children; Trans. by T. R., O. K., & E. V.)

Informants pointed to the resources needed by large families: accessible infrastructure and investment in children's human capital: "The school curriculum does not cover everything that is tested in the exams. I believe that it is not necessary to help financially, but please ensure that education is accessible to every family" (Female, 43, Bashkortostan, three children; Trans. by T. R., O. K., & E. V.). "Clubs and activities must be accessible and free. You need to pay attention to this so that the child develops" (Male, 40, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.). "The most important kind of help is to build infrastructure, so that the children could be taken to hockey, so that he could play hockey ... The issue of accessibility and development of infrastructure" (Female, 28, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.).

Financial assistance and investment in children's human capital were also mentioned by the respondents: "Well, financial support is always needed, because you see, now our eldest goes to three clubs. So, you have to pay for more than just one" (Male, 50, Nizhny Novgorod Oblast, five children; Trans. by T. R., O. K., & E. V.).

Other issues included childcare assistance, e.g., the distribution of time resources and costs: "I would like a person who could accompany at least one of the children to places [to clubs and sports activities]. Not a full-time nanny, just for this purpose" (Female, 27, three children, Volgograd Oblast; Trans. by T.R., O.K., & E.V.).

Large families' social capital (including grandparents, siblings) enables them to access extra help, including material assistance, childcare support, and time resources, particularly when warm, trusting relationships of mutual support and emotional ties with relatives are established:

We have a good relationship, we visit each other, communicate, celebrate holidays together, meet at our mother's and sister's. And my sister and children come to visit us. We help each other with some things, stories, and happiness, that is, we share everything we can. We even help each other financially when needed. (Male, 41, Ivanovo Oblast, three children; Trans. by T. R., O. K., & E. V.)

It's my sister and me. It's really good now that she's grown up and we have common interests. Really good. She comes and helps us with my children and you can always chat with her about something. (Female, 28, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.)

We asked participants about the assistance they receive from parents, relatives, friends, and non-profit organizations. In the sample, there were no families that sought assistance from NGOs, possibly because the financial well-being of families, which was controlled in the sample, was modal by region. Intra- and intergenerational connections (social capital) play a significant role in distributing resources (temporal and material) and advancing careers. Different types of support are combined in various ways and are received not only from parents but also from other relatives.

The husband's mom is retired, and so is mine. I don't have any issues here; I can attend to my affairs and go to work without worry [that is, the grandmothers look after the children]. (Female, 43, Bashkortostan, four children; Trans. by T. R., O. K., & E. V.)

My parents helped me pay off my debts, so I was able to get a mortgage. (Male, 36, three children; Trans. by T. R., O. K., & E. V.)

We only have relatives: parents, uncles. Help us with cash. Parents could take care of the children, take them for a walk. Vika's mother helped us with money, lived with us, helped with household chores. (Male, 42, Vologda Oblast, four children; Trans. by T. R., O. K., & E. V.)

Yes, our parents helped us a lot. While the children were small, only my husband worked, so they helped. Brother helped in any way he could. Not only financially, they helped to do repairs. (Female, 35, Ivanovo Oblast, three children; Trans. by T. R., O. K., & E. V.)

Parents with many children prioritize finding employment, but they face constraints or restrictions in terms of available job opportunities: "They didn't hire me for a long time because of sick leaves [the employer was afraid that the respondents would be taking too many sick leaves]. Then, when they hired me part-time, I was happy" (Female, 34, Nizhny Novgorod Oblast, three children; Trans. by T. R., O. K., & E. V.). "Well, I've had a career in the military, which I've completed, and I'm now retired. My wife mostly stayed at home with the children ... she never found a good job" (Male, 46, Volgograd Oblast, three children; Trans. by T. R., O. K., & E. V.). "In principle, we find time ... We understand that there is time for both (work and children). We work for ourselves. We have our own small private business" (Female, 28, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.). "Now I work freelance as a graphic designer ... this has not affected my life in any way, on the contrary, it has even become better, since I can be with my children and work successfully at the same time" (Female, 27, Volgograd Oblast, three children; Trans. by T. R., O. K., & E. V.).

There is also a traditional model, where a man acts as a breadwinner for the family:

She was trying to [work], and I said, but there's no point in you finding a job that pays twenty [thousand roubles], because ten you will spend on food, on commuting ... Here you don't have to worry, you are with the children, you raise them properly, at least for me. (Male, 50, Nizhny Novgorod Oblast, five children; Trans. by T. R., O. K., & E. V.)

My career was difficult because I had to change jobs, as a large family requires a lot of, so to speak, financial stability, so in the end I organized my own business, so now everything is good and stable, but having many children did not affect employment, because mostly, of course, my wife took care of the children. (Male, 45, Moscow, three children; Trans. by T. R., O. K., & E. V.)

Parents with many children often discuss their careers with extreme caution and skepticism: “There is no particular career, there is nowhere to grow. We are working slowly. No growth prospects” (Female, 35, Ivanovo Oblast, three children; Trans. by T. R., O. K., & E. V.). “We’re no longer striving for a career; we just work wherever we can. It’s all about where the opportunity arises” (Male, 50, Nizhny Novgorod Oblast, five children; Trans. by T. R., O. K., & E. V.). “At least they [the employer] didn’t kick me out after I had four children, they allowed me to come back, stay at least for two hours, they told me to come (Female, 42, Vologda Oblast, four children; Trans. by T. R., O. K., & E. V.).

Some respondents also provided positive evaluations regarding the career of a mother with many children. Typically, the youngest children of these parents are already of school age: “Having many children did not affect employment, because I had all my children when I was employed at the university” (Female, 45, Moscow, three children; Trans. by T. R., O. K., & E. V.). “Our careers are going well; my wife, regardless of the fact that she has three children, is progressing in her career. I also have a lot of career development at work, intellectual expansion of connections, financial prosperity” (Male, 41, Ivanovo Oblast, three children; Trans. by T. R., O. K., & E. V.).

The main challenges faced by large families include balancing family responsibilities with work, financial constraints, limited time, and the need for professional socio-psychological and pedagogical support to foster the development of children’s human capital.

I wouldn’t trade children for a career. My wife also says, it was the right time when everything happened. Now I would ... If I had stayed a year, I would have taken up a career—that’s it, I wouldn’t have had children. (Male, 50, Nizhny Novgorod Oblast, five children; Trans. by T. R., O. K., & E. V.)

For 12 years, we haven’t been able to go on vacation anywhere to relax. Financial difficulties, yes, we’ve faced some. (Male, 36, Bashkortostan, three children; Trans. by T. R., O. K., & E. V.)

Firstly, financial situation. Providing for children. The second difficulty is time. It costs a lot for both me and my wife. We ask grandparents to help. (Male, 42, Vologda Oblast, four children; Trans. by T. R., O. K., & E. V.)

Disobedience of children ... That is, relationships between people, relationships with their children. (Male, 34, Volgograd Oblast, three children; Trans. by T. R., O. K., & E. V.)

Children are growing older; we need to look for a new approach to them ... We need some kind of knowledge ... And we need to devote time to this, but we are always short of time. (Female, 28, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.)

The family's internal resources include the psychological strength of parent-child relationships, as well as the joy and pride that parents take in their children's accomplishments. "As for the positive side, it's a joy that children are all different. They are interesting to observe, watch, interact with" (Male, 42, Vologda Oblast, four children; Trans. by T. R., O. K., & E. V.). "I always rejoice at the successes of my children, their achievements, I try to support them in everything, just as they supported me" (Female, 45, Moscow, three children; Trans. by T. R., O. K., & E. V.). "Now, I believe that if there were no children, life would have turned out so boring and maybe would have gone downhill" (Male, 40, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.).

Some respondents expressed doubt that having many children is a joy, attributing it to the "slow development of a sense of fatherhood":

Where does joy come from for a father of many children? I have my own joys, so to speak, male ones, which I can afford. Diana has her own. There are also family joys that we share. The realization of paternity may come late ... If you look at your youngest daughter, then, of course, you are happy, no matter what conflicts arise. The feeling of fatherhood evolves. (Male, 36, Bashkortostan, three children; Trans. by T. R., O. K., & E. V.)

Another important resource for large families is health:

A flourishing family is when everyone is healthy, when there are no disabilities, God forbid, any deviations. This is a flourishing family. And the fact that they are rich or poor is not an indicator for me. The most important thing is to be healthy. Healthy, smart, not hooligans, not criminals. It is most important. (Male, 40, Sverdlovsk Oblast, three children; Trans. by T. R., O. K., & E. V.).

In-depth interviews have broadened our understanding of the resources available to large families. Institutional support is seen as a "bonus" rather than a decisive factor in their reproductive decisions. However, parents require various resources, including material, temporal, socio-psychological, informational (for shaping positive public opinion about large families), and educational resources to acquire necessary skills for family life and human capital development.

Conclusion

Our study confirmed the initial hypothesis that the formation and functioning of large families hinge primarily on internal family resources, such as accumulated human capital (skills, knowledge, and character traits essential for both family life and professional, recreational, or charitable pursuits). Parental investment in human capital includes education, knowledge, and experience in crafting personal and family strategies and careers.

Moreover, the viability of large families also relies on external institutional resources, which encompass formal interactions with government bodies and other organizations offering support for large families. These institutions assess requests to ensure compliance with regulations and determine whether the requested assistance will contribute to supporting large families effectively.

Additionally, the living conditions of large families are influenced by the development of social capital, encompassing networks like multi-generational families, religious communities, and friendships. For instance, agricultural communities often require significant labor, making large families valuable as a resource base and a form of old-age security (De Silva, 2003).

An analysis of trends in the structure of Russian families shows that the proportion of large families is higher among traditional, multi-generational families. This happens because families maintaining intra- and intergenerational ties have more resources, for example, they have more social capital, more temporal and managerial resources. The involvement of multiple family members enables more effective monitoring and distribution of responsibilities, allowing large multi-generational families to combine and leverage their resources more effectively.

Research (Children's Commissioner, 2022) indicates that, across various countries, for most individuals, the family remains the primary source of support during challenging times. For instance, in a British study, when asked about seeking help for family-related matters, 78% of parents preferred turning to family members, followed by 51% opting for friends and 20% considering medical services. Fewer parents expressed a willingness to reach out to social networks (including support groups), support forums, municipal services, or local public services.

Large families facing resource challenges can seek assistance from both state (such as social welfare systems) and non-state institutions (like civil organizations).

A significant number of experts believe that public policies that ensure universal access to child care services and child subsidies can help people realize their choices and create large families (Icardi et al., 2023). Despite the fact that many countries provide families with some form of financial assistance, the formats and amounts may vary greatly from country to country, and the opportunities available to families in the context of institutional support vary. For example, in Russia, large families (in the legislation they are defined as families with three or more children) are entitled to social benefits. In Italy, Lithuania, and Poland, there are benefits for families with three or more children, for example, they are offered "family card programs" to access certain services. Hungary has abolished the personal income tax for women raising four or more children. Poland has implemented the *Mama 4 Plus* program, which provides financial support to all mothers over the age of 60 who have had four or more children and who meet certain income criteria (Bruckmayer et al., 2020). However, in countries like Germany, large families are not actively encouraged or supported through specific family policies (Bujard et al., 2019).

The costs and benefits of family support programs vary significantly among countries worldwide. In several Western and Northern European nations, such as France, Sweden, and Poland, these expenses reach up to 3.44%, 3.42%, and 3.35%

of GDP, respectively (2019). OECD data shows that spending on family benefits is generally higher in most European countries, typically exceeding 2% of GDP, with figures dropping to 1.95% in Japan, 1.87% in Canada, 1.04% in the USA, and 0.54% in Turkey (OECD, n.d.). In Russia, this expenditure stood at 1.1% in 2019, rising to 1.4% in 2022 (Rosstat, 2023). Economic prosperity and the prevailing social policy framework largely dictate the amount of expenditure.

In Russia, government support for families includes various measures such as subsidies for children's goods, preferential housing loans for large families, and land allocation through federal and regional programs. The 2020 Constitutional Amendments emphasize children as a top priority of state policy, along with defining marriage as a union between a man and a woman (O sovershenstvovanii regulirovaniia, 2020). Other relevant support measures include sanctions for dysfunctional behaviors, such as deprivation of parental authority or restriction of parental responsibility.

Specialized institutions, such as coordinating councils, encourage public support for families. An important role is played by economic and regional state institutions, improving material well-being of families, childhood infrastructure, availability of family-friendly workplaces, small family businesses, and access to additional education for children.

Public organizations play a vital role in enhancing social capital by serving as effective communication tools and advocating for the interests of large families in social policies. Participation in these organizations builds specific social ties and helps large families to effectively make use of both internal and external resources.

While there are segments in public organizations dedicated to supporting large families, research suggests that these families may be reluctant to seek the assistance of such organizations due to factors such as trust levels and lack of awareness. Further investigation is needed to understand the extent of these barriers.

Despite the opportunities described above, the effectiveness of tapping into external institutional resources remains limited due to the lack of mainstream support for state fertility strategies, inadequate access to pedagogical and psychological assistance, concerns about the quality of medical care, and the availability of programs to develop children's human capital. Many large families struggle with insufficient living standards, which hinder their ability to fulfill their educational and social roles. Parental labor income, coupled with the time demands of childcare and social benefits, often place large families in the low-income bracket.

An important aspect to consider is the role of the "sharing economy" in supporting large families. This economic model, based on principles of shared consumption, aligns with traditions of reciprocity and mutual aid. Many Russian families, especially families with many children, tend to exchange children's items, both online and offline, among friends, acquaintances, and neighbors. This informal exchange, often involving free assistance or item transfers, is preferred by many families who are skeptical of formal practices due to high prices and short usage periods of children's goods. Additionally, informal exchanges of services are gaining popularity among families struggling with the rising costs of living, such as household, childcare, and transportation expenses (Kuchmaeva, 2020). In short, the informal communication

and network cohesion around childcare, education, and provision tasks are key aspects of the sharing economy's development in modern Russian society, which makes this area a promising avenue for further research.

To sustain their well-being, families need to mobilize their skills and abilities to search for and combine resources. However, as this effort intensifies, there is typically a decline in the number of large families due to prevailing negative or neutral societal attitudes towards them. Promoting a more positive perception of large families should involve both establishing institutional frameworks for their support and disseminating successful family models through various channels.

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ARTICLE IN THE SPECIAL SECTION

Exploring Fertility Dynamics and Factors Shaping Russia's Demographic Prospects

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ABSTRACT

The research examines fertility patterns in Russia by using current calendar birth rates and their implications for actual generations. Birth rates for these generations are derived from the 2020 Census data and are further refined through calculations employing one-year age-specific rates. This methodology allows us to estimate parameters for age-specific fertility models in real generations, offering a different approach compared to traditional population census methods. Given the variance in fertility rates by birth order, the analysis favors a segmented approach, separately considering trends for first, second, third, and subsequent births. Factors influencing fertility are examined both statistically, with a focus on the impact of population age–gender structure transformations on overall fertility rates, and through insights from *Vyborochnoe nabludenie reproduktivnykh planov naseleniia* [Sample Observation of Population Reproductive Plans] performed by Rosstat [Federal State Statistics Service] in 2022. Value orientations

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are the primary determinant in reproductive behavior, which means that a key goal of demographic policy is to influence these orientations. However, it is also possible to influence fertility rates through social and demographic policies creating favorable conditions for families to fulfill their desire for children.

KEYWORDS

fertility, birth order, real generations, determinants of fertility, reproductive orientations

Introduction

Fertility, a pivotal demographic phenomenon, influences the population's reproductive patterns, particularly in contexts of low mortality rates. Despite high life expectancy, to ensure population sustainability across generations, each woman ideally should have around 2.1–2.2 children on average. Meanwhile, in Russia, like other economically advanced nations, the birth rate currently falls significantly below this threshold.

This situation leads researchers to seek solutions for addressing challenges in safeguarding the national demographic well-being. However, the concept of demographic well-being remains largely undefined in research literature, with a significant exception of the work by Ryazantsev et al. (2022), who define it as a balanced ratio of quantitative and qualitative indicators of a country's (or region's) demographic development over at least five years.

Typically, authors gauge the level of demographic well-being by examining its constituent elements. These commonly include population size, natural and migratory growth, total fertility rate, mortality structure, life expectancy, and the balance of the population's age–gender structure (Orlova, 2001; Radovel, 2021; Ryazantsev & Miryazov, 2021; Ryazantsev et al., 2023). In this study, in addition to analyzing key demographic processes, particular attention will be given to the trends and factors influencing fertility in Russia.

To understand potential pathways for changes in fertility, evaluate its determinants, and explore strategies to enhance it, we need to analyze both statistical data and research evidence on reproductive behavior. Analysis of fertility trends traditionally relies on both current calendar indicators and indicators for real generations.

The number of children in a family, and consequently within a particular population or community, is influenced by its reproductive behavior. Therefore, analyzing reproductive behavior provides insights into fertility determinants and helps in devising measures to increase fertility.

This study analyzes fertility rates for both hypothetical and real generations, providing insights into how major events like the COVID-19 pandemic and demographic policies such as family benefits affect birth patterns and overall fertility rates across generations. These findings help assess the potential for stabilizing the demographic situation in Russia and forecast its further positive development.

Literature Review and Theoretical Assumptions

Research on fertility dynamics and determinants surged in the 20th century with the advent of regular population censuses and establishment of statistical records. These data allowed for the calculation of demographic indicators for both hypothetical and real generations. In Russia, pioneering studies in this area were conducted by Steshenko (1966) and Sifman (1970).

Currently, there are two main approaches to fertility research in Russia. Advocates of the first approach focus on hypothetical generations: for instance, Zyryanova (2022) analyzed birth rate trends in the Komi Republic during the COVID-19 pandemic, while Rostovskaya et al. (2023) identified factors potentially impacting demographic development in the Republic of Tyva. Ketova and Tretiakova (2020) revealed similarities in fertility trends between the Udmurt Republic and the overall national level. This approach is now used by policymakers to develop federal population management programs.

Proponents of the second approach focus on studying fertility dynamics in real generations to understand how events, processes, or governmental decisions influence fertility and population growth (Zakharov, 2023). For instance, Frejka and Zakharov (2014) compared predicted fertility indicators for hypothetical generations with actual birth rates, revealing limited impact of family and demographic policies implemented in the 1980s. Similarly, Kishenin (2023) examined birth rates across former USSR countries, explaining discrepancies between indicators for hypothetical and real generations. Arkhangel'skiy (2019) analyzed birth rates in actual generations of Russian women, identifying timing shifts and assessing the influence of government family support measures on decisions to have additional children among women of different birth years.

The division and analysis of fertility rates for hypothetical and real generations are not unique to Russian demographic studies. International researchers often examine the dynamics of childbirth among women belonging to different age groups. They often discuss the final birth rate among cohorts who have finished their reproductive years. However, fertility during women's active reproductive phase is less commonly analyzed, which suggests that resulting indicator values are more likely to fluctuate. This observation is supported by Kohler and Ortega (2002), who examined fertility dynamics and changes in women's reproductive behavior towards delaying childbirth.

International studies often compare women's level of education, which generally rose in the latter half of the 20th century, with the final birth rate to show that as women's education level increases, the age of first childbirth rises, intervals between subsequent births lengthen, and consequently, the total number of children decreases. However, there are variations among countries, reflected in the studies by Ahn and Sánchez-Marcos (2020), Andersson et al. (2009), Keskin and Çavlin (2022), Mirić (2018), Naz et al. (2006), Nisén et al. (2021).

The determinants of fertility encompass not only statistical but also socio-economic factors. Initially, Gallup researchers in the United States (Newport & Wilke, 2013) highlighted the correlation between socio-economic well-being and fertility rates. Subsequently, sociologists, economists, and demographers developed frameworks to delineate factors influencing reproductive behavior such as family income, living conditions, employment status of women, career aspirations, residential area type, and others. These factors were discussed by Antonov and Medkov (1982), Borisov

(1976), Filimonova et al. (2023), Hogan et al. (1987), Ildarhanova et al. (2022), Josipovič (2003), Kozlova and Sekitski-Pavlenko (2020), Mezeneva (2010), Mosakova (2008), Rodina (2023), Sinaj and Tushaj (2011), Sivoplyasova et al. (2022).

Additionally, people's reproductive preferences, shaped by parental family models, are often cited as a key fertility factor. Zhuravleva and Gavrilova (2017), Kasimovskaya et al. (2019), Rybakova et al. (2022), and Sivoplyasova (2022) consider this factor as primary.

This study investigates the dynamics and future prospects of Russia's birth rate, focusing on demographic well-being, defined as sustainable population reproduction and natural increase. Therefore, the study aims to identify fertility determinants and reproductive behavior factors to evaluate Russia's fertility prospects and explore potential strategies for improvement. To achieve this objective, we intend to analyze the dynamics of the fertility rate by calendar year and across real generations. Variations in dynamics and the influence of certain factors necessitate a differentiated analysis of fertility indicators by birth order. Special emphasis is placed on reproductive behavior and its determinants, as they shape birth rate levels and trends.

The analysis of statistical data relies on relative and average indicators. The crude birth rate (the number of births per 1,000 population) is contingent upon the age and gender structure of the population. The index method is used to disentangle the structural factor's influence from age-specific fertility rates (see Koshevoy et al., 2018).

In order to forecasting fertility, we employ the classical method of demographic forecasting known as "age shift."

To examine reproductive behavior and its determinants, we use data from the *Vyborochnoe nabludenie reproduktivnykh planov naseleniia* [Sample Observation of Population Reproductive Plans] conducted by Rosstat [Federal State Statistics Service] in 2022 in all Russian regions (Rosstat, 2022b).

Materials and Methods

The study relies on current state statistics and data from the All-Russian Population Census 2020 (Rosstat, 2022a). The former is used for the assessment of birth rate dynamics by calendar year and its differentiation, while the latter facilitates analysis of changes in birth rates across real generations. Fertility rates for real generations can be derived not only from population census data but also can be estimated by looking at one-year age-specific fertility rates. Furthermore, unlike the population census, this estimation can be conducted annually, i.e., at the beginning of each year; hence, we can calculate age-specific fertility characteristics in real generations, e.g., the average number of children born at a particular age or within a specific age range, and the average age of mothers at childbirth.

Results

Fertility Trends in Russia

After a significant increase in the first 15 years of the 21st century, overall fertility rates in Russia have been declining annually. By 2022, they had decreased by almost a third compared to 2014. Preliminary data for the period from January to October 2023 indicate a further 3.0% decrease in the number of births compared to 2022, with the total birth rate (per 1,000 population) declining by 2.2%.

The dynamics of total fertility rates are influenced by changes in age-specific fertility rates and the transformation of the age–gender structure of the population. The influence of these two components can be differentiated by using the index method (Table 1).

Table 1
Changes in the Total Fertility Rate in Russia in 2015–2022

Year	Change in total fertility rate	Including changes in	
		Age-specific fertility rates	Age and gender structure of the population
2015/2014	0.996	1.018	0.978
2016/2015	0.972	0.995	0.977
2017/2016	0.893	0.917	0.975
2018/2017	0.949	0.976	0.973
2019/2018	0.924	0.950	0.972
2020/2019	0.972	1.000	0.972
2021/2020	0.977	1.004	0.973
2022/2021 ¹	0.927	0.938	0.988

Note. Source: calculated by the authors according to data from Rosstat.

In 2015, a slight decrease in the total fertility rate occurred solely due to structural factors. The most significant contribution to the decline in age-specific fertility rates was observed between 2017 and 2019, while in 2020 and 2021, they remained relatively unchanged.

The dynamics of the total fertility rate are negatively impacted by changes in the age gender structure of the population. The active reproductive age group comprises relatively smaller cohorts born in the 1990s. In 2019 and 2020, structural changes contributed to a 2.8% decrease in the total fertility rate, with a slightly lesser impact in 2021 (2.7%).

The adverse effects of structural changes on total fertility rate dynamics are expected to persist until the late 2020s. Forecast calculations, assuming age-specific fertility rates remain at the 2022 level (to isolate the influence of structural factors), indicate a decline in the number of births until 2031 (to 1,103.4 thousand people), with the total fertility rate reaching its minimum in 2029–2030 at 7.8 per 1,000 population. In 2023, exclusively because of changes in the age–gender structure of the population, the total fertility rate may decrease by 2.8%, followed by declines of 2.5% in 2024, 2.3% in 2025, 1.9% in 2026, 1.5% in 2027, 1.0% in 2028, and 0.5% in 2029 (Table 2).

Table 2
Dynamics of the Total Fertility Rate While Maintaining Age-Specific Fertility Rates at the 2022 Level

Year	Number of births	Total fertility rate
2023	1,263.4	8.6
2024	1,226.5	8.4
2025	1,193.1	8.2

¹ Indicators for 2022 may not be entirely comparable to data from previous years, as they were calculated based on the results of the 2020 population census.

Table 2 Continued

Year	Number of births	Total fertility rate
2026	1,164.2	8.1
2027	1,140.7	8.0
2028	1,122.8	7.9
2029	1,110.5	7.8
2030	1,104.0	7.8
2031	1,103.4	7.9
2032	1,108.3	8.0
2033	1,117.8	8.1
2034	1,130.2	8.3

Note. Source: calculated by the authors according to data from Rosstat.

After reaching its minimum in 1999, the total fertility rate in Russia showed an almost steady growth (with the exception of 2005) until 2015. However, in 2016, there was a slight decrease, followed by a more significant decline in 2017–2019 (Table 3).

Table 3

Dynamics of the Total Fertility Rate in Russia in 2015–2022

Year	2015	2016	2017	2018	2019	2020	2021	2022	
								Based on 2020 Census data	Excluding 2020 Census data
Total fertility rate	1.777	1.762	1.621	1.579	1.504	1.505	1.505	1.416	1.452

Note. Source: calculated by the authors according to data from Rosstat.

In 2020 and 2021, the total fertility rate remained practically unchanged, but it decreased in 2022. Official data from Rosstat indicates a significant decrease (by 0.089) in the fertility rate for 2022. However, it is important to note that the calculation for 2021 did not consider the results of the 2020 population census, while the calculations for 2022 did. As a result, Rosstat will recalculate all demographic indicators for the period after the 2010 population census based on the 2020 census results. In this study, to maintain comparability with indicators from the previous period, the total fertility rate for 2022 was calculated without considering the census results. It amounted to 1.452, which is slightly higher than the officially calculated figure based on census data (1.416). The decrease relative to the 2021 level is 0.053.

As it was mentioned before, to maintain a replacement level in the population, the total fertility rate should be approximately 2.1–2.2. At this rate, each generation of parents will be replaced by a generation of children roughly equal in number. If the fertility rate exceeds this level, the population will grow with each generation, indicating extensive population reproduction. If the fertility rate falls below this level, younger generations will be smaller in number, leading to diminished population reproduction. Currently, Russia, like most economically developed countries, is undergoing a period of declining population reproduction.

It is essential to distinguish between population reproduction, which involves the replacement of generations, and the current calendar dynamics of natural population growth, which is the difference between births and deaths. While population reproduction represents the replacement of parents' generations by their children's generations, then in annual natural population growth parameters, the newborns replace mainly their great-grandparents or even older generations. The required total fertility rate for achieving zero natural population growth annually in Russia in 2022 would have been 2.06. However, the actual total fertility rate in 2022 was 1.416, which is 1.45 times lower.

Forecast calculations show that in the coming years, while age-specific mortality rates remain unchanged, the value of the total fertility rate required to ensure zero natural population growth will increase significantly. Only in the early 2030s will it stabilize, but at a very high level (Table 4). This is attributed to upcoming changes in the age and gender structure of the population. In the 2020s, relatively small generations born in the 1990s will continue to enter the active reproductive age. Simultaneously, numerous generations born after World War II will reach ages with a relatively high probability of mortality.

Table 4
Projected Values of the Total Fertility Rate Required to Ensure Population Reproduction

Year	Natural population change	Required total fertility rate
2023	-657.0	2.15
2024	-714.4	2.24
2025	-768.5	2.33
2026	-818.0	2.41
2027	-864.5	2.49
2028	-906.0	2.56
2029	-943.5	2.62
2030	-975.7	2.67
2031	-999.5	2.70
2032	-1,017.4	2.71
2033	-1,029.7	2.72
2034	-1,037.5	2.71

Note. Source: calculated by the authors according to data from Rosstat.

To maintain the total fertility rate necessary for zero natural population growth at the 2022 level (i.e., 2.06), a reduction in age-specific mortality rates compared to the previous year on average by 2.4% in 2023, by 2.5% in 2024, by 2.3% in 2025, by 1.9% in 2026, by 1.5% in 2027, by 1.0% in 2028, and by 0.5% in 2029 is required. Consequently, compared to the 2022 level, age-specific mortality rates should be lower on average: by 4.9% in 2024, by 7.0% in 2025, by 8.8% in 2026, by 10.2% in 2027, by 11.1% in 2028, and by 11.5% in 2029 and 2030.

According to Rosstat (2022b), the average desired number of children, i.e., the number of children people would like to have if all necessary conditions were met, was below 2.06: 2.00 for women and 1.97 for men. The average expected number of children (the number they plan to have) is even lower and equals 1.76 for women and 1.74 for men. The average desired number of children was lower than in a similar study conducted in 2017, which is 2.15 for women and 2.16 for men. Of particular concern from the demographic perspective is that people under 25 have a significantly lower average desired number of children: 1.89 for women and 1.84 for men.

Therefore, the probability of achieving the fertility level necessary to overcome natural population decline in Russia in the next decade is extremely low. The focus should be on a slight increase in the birth rate to reduce natural population decline. A more significant increase in the birth rate may be achieved through improved conditions for fulfilling the existing need for children.

Alongside enhancing conditions that facilitate the realization of people's reproductive preferences, it is also imperative to actively promote the large family model since the primary determinant shaping the need for children is value orientations.

The dynamics of the total fertility rate in Russia vary significantly depending on birth order, suggesting that its determinants differ for first, second, third, and subsequent births (Table 5).

Table 5

Total Fertility Rate by Birth Order in Russia in 2015–2022

Year	Birth order		
	1 st	2 nd	3 rd and subsequent
2015	0.787	0.688	0.302
2016	0.764	0.686	0.312
2017	0.705	0.604	0.312
2018	0.664	0.582	0.332
2019	0.638	0.531	0.335
2020	0.625	0.523	0.356
2021	0.609	0.524	0.372
2022 (based on 2020 Census data)	0.595	0.462	0.359
2022 (excluding 2020 Census data)	0.612	0.473	0.367

Note. Source: calculated by the authors according to data from Rosstat.

The total fertility rate for first births peaked in 2012 at 0.811, maintaining near-stability in 2013 at 0.809 before steadily declining in subsequent years. According to Rosstat data incorporating the All-Russian Population Census 2020, by 2022, this figure had decreased to 0.595. An equivalent metric for real generations is the average number of first births or the proportion of women who have had at least one child. If this

metric remained consistent over time, it would suggest that 40.5% of women had not given birth by the end of their reproductive years. However, it is estimated that the rate for currently active reproductive-aged women is approximately 15% or slightly lower. According to the All-Russian Population Census 2020, among women aged 35–39, the average number of first births is 0.86 (indicating 14% without children), and even among those aged 30–34, it is 0.78 (with 22% without children). While the increase in the average number of first births for 35–39-year-olds is projected to be modest, it is expected to be significant for 30–34-year-olds.

The decline in the total fertility rate for first births in 2020 and 2021 was relatively modest, with a slightly larger drop observed in 2021 (2.6%) compared to 2020 (2.0%). However, considering the substantial decrease in age-specific rates for first marriages among women in 2020 (20–24-year-olds by 18.6%, 25–29-year-olds by 14.5%), possibly linked to COVID-19 restrictions, one might have expected a more significant reduction in the total rate for first births in 2021.

It is worth noting that the total fertility rate for first births is closely associated with the number of marriages per 1,000 population in the previous year. In Russia, from 2000 to 2022 the correlation coefficient between these indicators was 0.86.

The introduction of maternal (family) capital for the first child in 2020² likely had a positive impact, counteracting the decline in the marriage rate and influencing the change in the total fertility rate for first births in 2021 (O vnesenii izmenenii, 2020). Rosstat indicates that the total fertility rate for first births in 2022 (0.595) was lower than in 2021 (0.609). However, if we compare the 2022 value with the 2021 indicator calculated without considering the 2020 census data to ensure comparability, the total fertility rate for first births for 2022 (0.612) turns out to be slightly higher than that of 2021.

The significant decrease in the total fertility rate for first births, which is notably lower than the average number of first births in actual generations, could be linked to timing shifts resulting in delayed first births. This delay could stem from both the postponement of first marriages (at least their registration) and the postponement of first births in marriage. According to Rosstat (2022b), for couples in their first registered marriage of three years or longer, the percentage of those without children is 6.2% for women and 7.4% for men. In unregistered marriages, the respective percentages are 39.6% for women and 43.7% for men. Additionally, the proportion of women aged 25–29 who have never been married increased from 26.3% according to the 2010 population census to 31.7% according to the 2020 population census.

The total fertility rate for second births in Russia saw a significant increase in 2007, rising by 0.069 from 0.410 in 2006 to 0.479. This notable increase can be largely attributed to the initiation of the federal maternity (family) capital program. Subsequent years witnessed smaller increases in the total fertility rate for second births: by 0.039 in 2008, 0.018 in 2009, 0.029 in 2010, 0.009 in 2011, and by 0.046 in 2012. Regional measures aimed at assisting families with children may have contributed to this increase in 2012. However, in 2013, the increase in the total fertility rate for second

² Maternal capital for the first child is a targeted monetary payment provided to families upon the birth or adoption of their firstborn from January 1, 2020, to December 31, 2026. Maternal capital is issued in the form of a certificate, which can only be spent for specific purposes.

births was minimal (by 0.005), while in 2014 (by 0.033) and 2015 (by 0.030), it was quite significant.

Indirect estimates suggest that from January to August 2016, the total fertility rate was even higher than in 2015, albeit with fewer children born overall. This slight reduction was associated solely with changes in the age-gender structure of the population, while age-specific and total fertility rates increased. However, from September to December 2016, there was a significant decline in the total fertility rate, especially for second births. This decline is notable because there was no corresponding decrease in birth rates for third and subsequent births in the same period.

The dynamics of fertility rates for second births in 2014, 2015, and 2016 could have been influenced by timing shifts associated with families opting to have a second child earlier due to the originally set deadline for the federal maternity (family) capital program, which was scheduled to end in 2016. On December 3, 2015, it was announced that the program would be extended, which likely contributed to a slowdown in timing shifts, as families no longer felt rushed to have a second child. Consequently, a timing gap emerged, leading to a decline in fertility rates starting in September 2016.

After timing shifts associated with the earlier birth of children, a timing failure and a decrease in fertility are inevitable since some of the second children who could be born in subsequent years have already been born earlier. If this program had not been extended, the time gap would have begun not in September 2016, but in January 2017, and it would have been significantly greater. The exit from the timing gap occurs gradually as the generations that were not affected by the timing shifts reach the age of active birth of second children.

This hypothesis is further supported by the fact that there was no decrease in birth rates for third and subsequent births during the same period. If there were any other factors influencing reproductive behavior, then, almost certainly, they would be reflected in third births. Timing shifts practically could not influence the dynamics of third and subsequent births. In contrast to second births, for third and subsequent births the increase in the total fertility rate in 2015 (by 0.008), on the contrary, was the smallest for the period since 2010. In order to qualify for maternal (family) capital for the third child, the second child had to be born before 2007. Instances of a third child being born between 2014 and 2016, with an interval of 8–10 years after the birth of the second child, and a desire to use maternal (family) capital were likely uncommon.

Timing shifts at the birth of a second child are also evidenced by fertility rates in real generations. For instance, for women born in the 1970s, the average number of second births decreases by the age of 30, from 0.34 for those born in 1970 to 0.27 for those born between 1977 and 1980. However, in younger generations, such as those born in 1987 and 1988, the average number of second births by 30 rises to 0.34 again, before decreasing to 0.31 for those born in 1990. Interestingly, in the age interval of 30–32 years, the average number of second births increases from 0.07 for women born in 1970 to 0.14 for those born between 1983 and 1985, but then decreases in younger generations. This indicates that for women born in the second half of the 1980s, there was an increase in the average number of second births at younger ages and a decrease at older ages compared to older generations.

In 2017–2019, the total fertility rate for second births in Russia saw a significant decrease, which was especially pronounced in 2017. However, in 2020, the decrease was minimal (by 0.008), followed by a slight increase of 0.001 in 2021. This trend might suggest that progress was being made in closing the timing gap. However, in 2022, the total fertility rate for second births showed another significant decrease (by 0.051). Without considering the 2020 population census data, its value was 0.473, and with the census data taken into account, it was 0.462. The decrease in 2021 may have been influenced by delayed births (conceptions in 2021) due to the COVID-19 pandemic.

On the other hand, the total fertility rate for third and subsequent births has been increasing almost consistently, and only 2017 showed no change compared to 2016. However, in 2022, the total fertility rate for third and subsequent births showed a decrease of 0.005 (if calculated without considering the All-Russian Population Census 2020 data, i.e., in a form comparable to previous years).

Fertility Rates in Real Generations

According to the All-Russian Population Census 2020, the average number of children born in older generations of women is decreasing, reaching a minimum of 1.60 for women aged 45–49 and 50–54 at the time of the census. However, in younger generations, it slightly increases, reaching 1.66 among women aged 40–44. Even for women aged 35–39, who are still in their active reproductive years, the average number of children born (1.61) is higher than for those aged 45–54.

Generational changes in the average number of children born are driven by two contrasting trends. Firstly, the average number of first births is decreasing, leading to a higher proportion of women without children. Secondly, there is an increase in the proportion of women who have a second child after their first, as well as an increase in the proportion of women who have a third child after their second.

In generations of women who were 60–69 years old in 2020, the average number of first births is 0.93, for 45–49-year-old women it is 0.90, and for 40–44-year-old women it is 0.89.

The proportion of women who have a second child after their first decreases from 67.7% among women aged 65–69 years old in 2020 to 56.1% among those aged 50–54. However, in younger generations, this proportion increases and reaches its peak among women aged 35–39 in 2020 (62.2%). This figure is expected to rise further by the end of their reproductive years. Even now, it exceeds that of women who are 20 years older (61.9%).

The share of those who gave birth to a third child among those who gave birth to a second decreases from 29.1% among women who were 70 years or older in 2020 to 22.9% among those who were 55–59 years old. In younger generations it increases and reaches its maximum (for now) in 40–44-year-old women (29.8%). In contrast, women aged 35–39 and 40–44 show a higher proportion of those who have a third child after their second compared to those aged 70 or older. This difference is expected to slightly increase by the end of their reproductive years.

An assessment of fertility rates in real generations based on one-year age-specific fertility rates indicates that the average number of children born in Russia changed

relatively little in generations of women born in the 1950s (in the range of 1.84–1.90, without pronounced dynamics) and decreased significantly in generations born in the 1960s and early 1970s: from 1.86 for women born in 1960 to 1.58 for women born in 1973. In younger generations, the average number of children born increases slightly reaching a maximum of 1.70 among women born in 1982 (Table 6). At the beginning of 2023, they were 40 years old and until the end of their reproductive period, the average number of children born to them is likely to increase slightly.

Table 6

Fertility Rates in Real Generations in Russia (at the Beginning of 2023)

Women's birth year	Average number of children born	Average number of 1 st births (% of those who gave birth to at least one child)	% of those who gave birth to a 2 nd child among those who gave birth to their 1 st child	% of those who gave birth to a 3 rd child among those who gave birth to a 2 nd child
1960	1.86	0.95	70.0	25.5
1961	1.83	0.94	68.9	25.0
1962	1.77	0.92	68.0	24.5
1963	1.74	0.92	66.4	24.1
1964	1.71	0.92	64.4	24.3
1965	1.69	0.92	62.4	23.9
1966	1.67	0.92	60.5	24.0
1967	1.65	0.92	58.6	24.3
1968	1.63	0.92	57.2	24.5
1969	1.63	0.93	56.1	24.7
1970	1.61	0.92	54.5	25.0
1971	1.60	0.92	54.2	25.4
1972	1.59	0.91	54.9	25.8
1973	1.58	0.89	55.7	26.6
1974	1.61	0.90	56.9	27.4
1975	1.62	0.89	58.0	28.3
1976	1.63	0.89	59.2	29.1
1977	1.65	0.88	60.6	30.1
1978	1.67	0.88	61.9	31.0
1979	1.69	0.88	62.8	31.7
1980	1.67	0.87	63.3	32.1
1981	1.67	0.86	64.2	32.5
1982	1.70	0.87	65.4	32.7
1983	1.69	0.86	66.5	32.3
1984	1.67	0.85	66.3	32.0
1985	1.63	0.84	65.5	31.7

Note. Source: calculated by the authors according to data from the Human Fertility Database³ and Rosstat.

³ <https://database.earth/population/russian-federation/fertility-rate>

The average number of first births declines across most generations born in the 1960s, settling at 0.92. For women born in 1973–1976, it dips slightly to 0.89–0.90; for those born in 1977–1979, it is 0.88; for those born in 1980–1983, 0.86–0.87; for those born in 1984, it is 0.85; and for those born in 1985, 0.84. Although the average number of first births may show a slight uptick for women born in 1984–1985 before the end of their reproductive years, it is unlikely to exceed 0.86. Consequently, the proportion of women without children has risen from 8% to 14–15%.

The percentage of women having a second child after their first decreases until the generation born in 1971, reaching 54.2%. However, in younger generations, this proportion increases, peaking among women born in 1983 at 66.5%. At the beginning of 2023, these women were 39 years old. Given that the likelihood of having a second child is higher than that of having a first, the proportion of women who have a second child after their first is expected to continue increasing by the end of their reproductive years.

Zakharov (2016) argues that the likelihood of second births today remains significantly lower than the levels observed among generations born in the 1950s and 1960s during the 1980s. However, it seems appropriate to talk about the dynamics of this indicator. Among women born in 1956, the share of those who gave birth to a second child among those who gave birth to their first is 8.6 percentage points higher than for those who are 10 years older. For women born in 1983, it is 12.3 percentage points higher than for women born in 1971.

The share of those who gave birth to a third child among those who gave birth to a second decreases to the generation of women born in 1965, for whom it is 23.9%. The highest value of this indicator, after its increase, is 32.7% (an increase of 8.8 percentage points) for women born in 1982, which means that almost a third of those who gave birth to a second child also had a third. At the beginning of 2023, these women were 40 years old, and it is expected that by the end of their reproductive years, the proportion of those giving birth to a third child after their second will continue to rise. Such a substantial proportion of second-child bearers who opt to have a third child has not been observed in Russia since the generations born in the late 1930s.

The average age of a mother at the birth of her first child decreased until the generation of women born in 1967, for whom it is 22.69 years. In older generations it increases significantly and for women born in 1984 amounts to 24.84 years. For women born in 1985, the average age at the birth of their first child is still slightly lower (24.78), but at the beginning of 2023 they were 37 years old and by the end of their reproductive period this figure will increase.

The rise in the average age of mothers at the birth of their first child can be viewed from two perspectives. On the one hand, older parents often enjoy greater financial stability and have established professional careers. On the other hand, from a demographic standpoint, this trend can have negative implications. Firstly, as individuals age, their health, including reproductive health, tends to decline, potentially leading to fertility issues or infertility. Secondly, if childbirth occurs later in a couple's relationship, it may disrupt their established lifestyle, which was built without children. In other words, postponing parenthood could conflict with the couple's lifestyle

preferences and values. Additionally, the decision to have children may be influenced by the perceived importance of parenthood relative to other priorities and lifestyle choices.

The average age of a mother at the birth of her second child also increases, and to a greater extent than at the birth of her first child. Its lowest value was observed in the generation of women born in 1964 (26.16 years). For women born in 1980, it is 30.02 years and will increase slightly, since at the beginning of 2023 they were 42 years old and some of them will have a second child.

The generational increase in the average maternal age at the birth of her second child surpasses that of her first. Consequently, the gap between the average maternal ages at the births of the first and second children widens. This gap slightly decreased among generations born in the 1950s and early 1960s, possibly due to state support initiatives for families with children in the 1980s, potentially prompting earlier second births in some families. It reached its lowest point among women born in 1963, at 3.31 years. However, among younger generations, this gap has significantly expanded. As of the beginning of 2023, this figure is the highest among those born in 1975 and 1976, at 5.95 years. For younger cohorts, this gap is slightly smaller: 5.89 years for born in 1977; 5.80 for born in 1978; 5.67 for born in 1979; 5.56 for born in 1980. However, since these cohorts have not completed their reproductive years, it is uncertain whether there will be a reduction in this gap due to potential earlier second births, possibly stimulated by intensified support measures like the federal maternal (family) capital introduced since 2007. Nonetheless, a significant reduction in this gap seems unlikely in these generations. Importantly, this difference does not fully represent the average interval between the births of the first and second children. In order to calculate this, we need data on the average age of mothers at the birth of their first child, among those who subsequently had a second child, which are not available.

Determinants of Fertility and Reproductive Behavior

In 2022, to counteract natural population decline in Russia, the total fertility rate would need to reach 2.06. Results from Rosstat (2022b) revealed a group of respondents whose average expected number of children closely approximated this target, as indicated by their responses to the question “How many children (including existing ones) are you planning to have?”

Two distinct groups can be distinguished: one group, the family-oriented, prioritizes the importance of being in a registered marriage and tends to value the traditional family model (this group includes those who assigned 5 points to being in a registered marriage and 1 point to “being free, independent and doing what I want”). The other group, oriented toward individualist values, places greater emphasis on personal freedom and independence, often valuing non-traditional family arrangements (this group includes those who assigned 5 points to “being free, independent and doing what I want” and 1 point to being in a registered marriage).

The family-oriented respondents comprised 17.4% of women and 17.1% of men, whereas those inclined towards individualist values constituted 2.5% and 3.6%, respectively. Respondents who did not exhibit extreme contrasts in their assessments of these values were excluded from these groups.

Reproductive aspirations diverged significantly between the selected groups. Among the family-oriented, women expressed a desired average of 2.19 children, and men, 2.24 children, provided they have all the necessary conditions. Conversely, those oriented towards individualist values aimed for an average of 1.45 and 1.30 children, respectively. The average expected number of children for the family-oriented respondents stood at 2.04 for women and 2.05 for men, while for those oriented at individualist values, it was 1.20 and 1.11, respectively (Table 7).

Table 7

Average Desired and Expected Number of Children Among Family-Oriented Respondents and Respondents Oriented Towards Individualist Values

Group of respondents	Average desired number of children		Average expected number of children	
	Females	Males	Females	Males
Family-oriented	2.19	2.24	2.04	2.05
Oriented towards individualist values	1.45	1.30	1.20	1.11

Note. Source: Rosstat (2022b).

A comparison between reproductive intentions (based on the 2015 micro-census) and the actual average number of children born in women’s generations (based on the 2020 census) reveals that the expected number of children falls short by approximately 0.11–0.13. Despite the observed difference between reproductive intentions and actual birth rates, family-oriented individuals tend to come close to achieving the desired birth rate necessary to maintain a stable population (i.e., zero natural increase). The realization, albeit partial, of the desired number of children among family-oriented individuals would result in an average number of children born very close to the threshold of total fertility rate necessary for population reproduction (around 2.1–2.2).

These findings strongly indicate that value orientations significantly influence reproductive behavior. A larger proportion of individuals who prioritize strong family values represent the primary potential source for a notable increase in the fertility rate.

Moreover, an improvement in the standard of living among families could also contribute to an increase in the fertility rate, as it enhances the perceived conditions for fulfilling their desire for children. This correlation is evidenced by the relationship between the discrepancy in the average desired and expected numbers of children and respondents’ assessment of the standard of living (Table 8).

Table 8

Difference Between the Average Desired and Expected Numbers of Children Depending on the Assessed Standard of Living

Assessment of the living standard (points)	Females	Males
90–100	0.15	0.17
70–80	0.19	0.19
50–60	0.24	0.23
30–40	0.20	0.29
0–20	0.26	0.29

Note. Source: Rosstat (2022b).

The smallest disparity between the average desired and expected number of children for both women and men is observed among those who rate their standard of living highest (90–100 points), while the largest gap is associated with the lowest assessment of the standard of living (0–20 points).

People's assessment of the standard of living predominantly reflects their perceptions of favorable conditions for fulfilling their desire for children. Therefore, it is recommended to account for the influence of the perceived standard of living on the expected number of children in homogeneous groups with regard to their desire for children. Typically, the desired number of children serves as a distinguishing indicator in such cases.

To ensure an accurate assessment of the impact of standard of living on reproductive intentions, we need to consider the influence of existing children on individuals' perceptions of their standard of living, with a separate focus being made on those without children to avoid potential biases (Table 9).

Table 9

Average Expected Number of Children Among Respondents Without Children Depending on Their Assessment of the Standard of Living and the Desired Number of Children

Assessment of the living standard (points)	Average expected number of children given the desired number of children:			
	Females		Males	
	2	3	2	3
90–100	1.90	2.63	1.92	2.79
70–80	1.89	2.56	1.81	2.69
50–60	1.84	2.62	1.82	2.54
30–40	1.91	2.76	1.72	2.65
0–20	1.91	2.03	1.61	3.00

Note. Source: Rosstat (2022b)

According to Rosstat (2022b), for women without children, in groups with the same desired number of children, there is generally no correlation between the average expected number of children and the perceived standard of living. However, an exception is observed for women who would like to have three children but rate their standard of living as very low (0–20 points), which results in a notably lower average expected number of children. Conversely, men who would like to have three children exhibit a notably higher average expected number of children with the lowest perceived standard of living. However, it should be noted that other factors may also influence the relationship between desired and expected numbers of children. Differences in the average expected number of children vary significantly across columns with different desired numbers of children compared to rows with different assessments of living standards, indicating that the desire for children more strongly shapes reproductive intentions than the conditions for their realization. Additionally, a significant determinant of reproductive intentions is the number of children in the parental family (see Table 9 and Table 10).

Table 10
Average Desired and Expected Number of Children Depending on the Number of Children Born to the Respondent's Mother

Number of children born to the respondent's mother	Females		Males	
	Average desired number of children	Average expected number of children	Average desired number of children	Average expected number of children
1	1.73	1.54	1.70	1.52
2	2.03	1.84	1.99	1.79
3	2.25	2.01	2.22	2.00
4	2.57	2.33	2.52	2.24
5 or more	2.92	2.67	2.99	2.58

Note. Source: Rosstat (2022b).

If the respondent's mother had five or more children, the average desired number of children is notably higher for both women (by 1.19) and men (by 1.29) compared to those who were the only child. Similarly, there are significant but slightly smaller differences between these two groups in the average expected number of children: by 1.13 for women and by 1.06 for men. This pattern has been observed in other studies, for example, Balashov and Savinov (1987), Kuz'min (1986). Therefore, a relatively smaller number of children in a family tends to result in lower reproductive aspirations in children from that family, potentially leading to a decrease in the birth rate in the subsequent generation.

Conclusion

The birth rate in Russia remains significantly below the level required to ensure population replacement and prevent natural decline. The notably low total fertility rate for first births can be attributed primarily to the trend of delaying marriages, or at least their formal registration. At the same time, there is also a tendency to postpone childbirth in marriages. This assessment is supported by the fact that this rate is notably lower than the average number of first births in actual generations.

The rise in the total fertility rate for second births persisted until 2015–2016, largely owing to the influence of the federal maternal (family) capital program. The substantial increase in this rate in 2014 and 2015 indirectly indicates shifts in timing, with some families opting for earlier childbirth of their second child. The subsequent decline in the total fertility rate for second births can be attributed largely to inevitable timing disruptions following such shifts, where second children that might have been born in those years were instead born earlier.

In the data on real generations, we can observe two contrasting trends. On the one hand, there is a decline in the average number of first births among younger women, leading to a slight increase in the proportion of women without children. On the other hand, there is an increase in the proportion of individuals who proceed to

have a second child after their first, as well as an increase in the proportion of those who have a third child after their second. Therefore, in addition to supporting second, third, and subsequent births, demographic policies should also address the growing proportion of childless individuals.

Our findings show that the primary determinant in reproductive behavior is value orientations. Consequently, a key focus of demographic policy aimed at boosting future fertility rates and ensuring population replacement is to influence these orientations to prioritize family, marriage, and children. It is these value orientations that chiefly dictate the desire for children. However, some increase in the fertility rate can also be attained through social and demographic policies geared towards establishing more favorable conditions for families to fulfill their desire for children.

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ARTICLE IN THE SPECIAL SECTION

Social Profile of Mothers Raising Children With Disabilities: A Survey in Rural and Small-Town Russia

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ABSTRACT

Like any other family, families with disabled children have their share of joys and sorrows. However, social attitudes and prejudices towards disabilities often pose more significant challenges than the child's condition itself. Discrimination against mothers raising disabled children comes to the fore in social interactions, where the child's disability can unfairly define the mother, subjecting her to stigmatization. The ability of parents, particularly mothers, to mobilize resources is crucial for the family's well-being, as they often bear the primary responsibility for child care. In Russia, one in three disabled children is raised by only one parent. Social services for families with disabled children are evolving in response to families' needs, but there is currently no unified system to verify their effectiveness. Our study was conducted in 2024 in Vladimir and Nizhny Novgorod Oblasts and explored socio-psychological distress in families with disabled children. Through semi-

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structured interviews with 98 women whose children attend social rehabilitation institutions, we gained insights into mothers' experiences, including their life satisfaction, access to state and social support, as well as daily stigmatization. These findings provide a comprehensive understanding of the challenges faced by women raising disabled children, highlighting areas of social disadvantage and stigma in provincial contexts.

KEYWORDS

disability, family with a disabled child, motherhood, parenting a child with a disability, stigmatization, social support

Introduction

Analysis of the social status of mothers with disabled children at a microlevel offers valuable insights into the daily challenges they face. It also helps identify mechanisms in social welfare and support systems that either exacerbate or alleviate inequality and social distress. Many everyday practices and interactions are underpinned by the assumption that a child's disability is a consequence of the mother's marginalization, such as her unhealthy lifestyle, antisocial behavior, or failure to follow medical advice.

The life stories of the women in our study shed light on the survival strategies employed by families raising atypically developing children within the evolving landscape of social policy and society. Ironically, despite advancements in social protection, women raising children with disabilities often find their needs overlooked. These women face a myriad of challenges, including difficulties in socializing their children, household chaos, career obstacles, single parenthood, emotional exhaustion, and physical fatigue. Their personal struggles exacerbate the stigma surrounding disability and contribute to negative societal attitudes towards inclusion.

Moreover, women living in provincial areas face even greater challenges compared to residents of regional centers and large cities. The limited resources and support available in provincial settings exacerbate the difficulties faced by these families.

Our research aims to uncover the most pressing socio-psychological issues in families with disabled children, create a social profile of mothers in these families, and propose strategies to address these challenges at the community level.

Theoretical Framework

Since the latter half of the 20th century, *disability studies* have emerged as a distinct field of inquiry, challenging the traditional medical perspective on disability. There is growing recognition of the need to integrate socio-cultural, socio-anthropological, legal, and gender perspectives to gain a comprehensive understanding of disability as a social issue.

This work explores the themes of atypicality and otherness by drawing on various sources, the most important of which are (a) the insights of M. Foucault regarding medicine, prisons, madness, and sexuality; (b) contemporary perspectives on stigma and stereotyping; and (c) theory of social exclusion and poverty (Abrahamson, 2001).

The development of disability sociology in Russia owes much to the conceptualization of themes related to atypical development in the works by Chernyaeva (2005), Iarskaia-Smirnova (1997), Maleva et al. (1999), Romanov & Iarskaia-Smirnova (2010), and Yarskaya (2008). More recent contributions to this research area were made by Detochenko (2020), Fomina (2021), Fomina & Gulyaev (2024), Naberushkina & Besschetnova (2023), Rostovskaya et al. (2021), Voevodina (2021), and some others.

A recent study highlights the discriminatory experiences of people with disabilities in various aspects of public life (Breffka et al., 2023). Discriminatory attitudes are rooted in stereotypical beliefs held by non-disabled individuals about the causes of disability and the cognitive and physical abilities of disabled individuals.

As international norms for inclusive social development are adopted by more and more countries, the situation gradually changes. However, disabled individuals continue to face limited agency, as emphasized in both Russian and international academic literature. To enhance the participation of people with disabilities and promote their full citizenship, it is crucial to involve them in community activities such as self-help groups, volunteering, and civic organizations, as advocated by J. M. Levitt (2017).

Contemporary disability studies emphasize the agency of individuals with disabilities (McCrary, 2016). This concept is viewed by Russian scholars as the capacity for significant social and political engagement (Iarskaia-Smirnova & Yarskaya, 2020). The education system in modern Russia is a notable sphere where this agency is evident (Iarskaia-Smirnova et al., 2024).

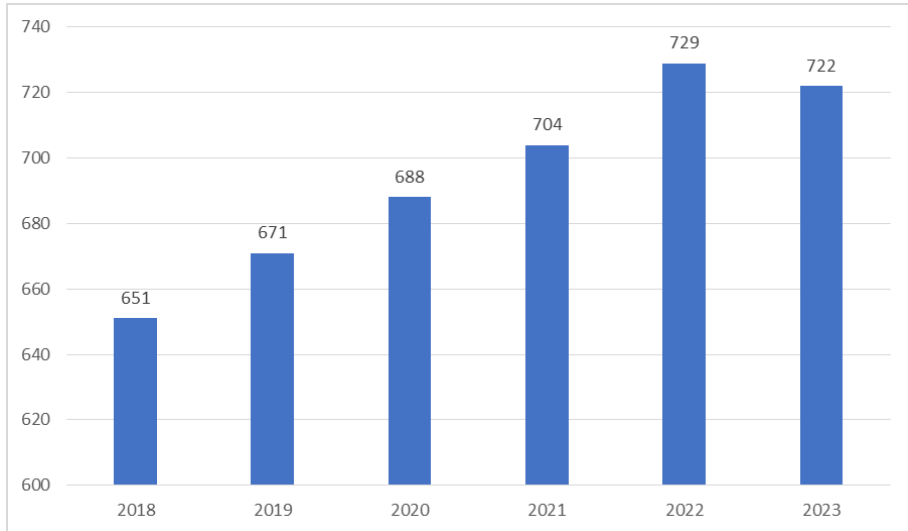
In their study of the characteristics of British students with chronic illnesses, Hamilton et al. (2023) have shown that individuals with non-visible disabilities may go unrecognized as having disabilities by university staff and peers, who perceive them as “less ill” than those with visible impairments.

Internationally, a diverse range of studies addresses stigma and socio-psychological challenges encountered by people with disabilities. Research on family stress and life satisfaction among mothers raising children with disabilities explores the effectiveness of educational and training programs in reducing stress levels (Çalışkan et al., 2024).

Another interesting aspect is the examination of the experiences of individuals with disabilities in relation to socio-spatial-political phenomena such as disability policies and laws, economic conditions, disability movements, and social welfare systems in Asian countries (Chou et al., 2024). The works of these authors underscore disability as a basis for discrimination and oppression.

According to Rosstat [Federal State Statistics Service], the number of disabled children increased between 2018 and 2023, reaching 722 thousand individuals by 2023, including 197 thousand children under the age of seven (Figure 1).

Figure 1
Number of Children With Disabilities in Russia



Note. Based on data from Rosstat [Federal State Statistics Service].

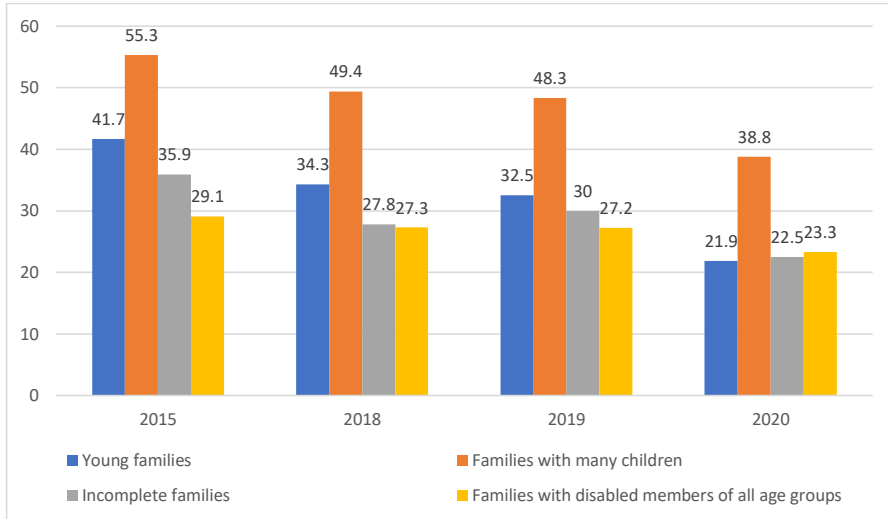
Among children under 18 with primary disabilities, the distribution by illness/condition is as follows: mental and behavioral disorders account for the largest share (24,506 people), followed by diseases of the nervous system (8919), and congenital anomalies, deformities, and chromosomal disorders (10,378).

In the structure of low-income population, families with disabled children accounted for 9.3% in 2020 according to data from a sample survey of households. Among these households, 1.9% are families with disabled children under 18. It should be noted that although disabled children are considered to be in a risk group, they still find themselves in a more favorable socio-economic position compared to children from large families and young families (Figure 2).

Children under 18 with disabilities receive social pensions, with an average payment of 14,998.4 rubles in 2022. Families with disabled children also receive monthly cash payments, averaging 2,272 rubles in 2022. However, researchers note challenges in analyzing the socio-economic status of these families due to insufficient statistical data. Discrepancies exist between the data provided by the Pension Fund and the Ministry of Health and Social Development.

Safiullina and Morozova (2020) argue that families with disabled children typically experience lower material well-being compared to those without such children, primarily because one parent, typically the mother, dedicates herself entirely to caregiving. This often leads to reduced employment or career opportunities as mothers may transition to low-paying, unskilled jobs, often home-based, affecting the family's overall quality of life. Consequently, the father often becomes the primary breadwinner, seeking additional income sources and having limited time for childcare. As a result, caregiving responsibilities predominantly fall on the mother.

Figure 2
The Level and Profile of Poverty Among Children Under 18 in Household Categories



Note. Source: Rosstat & Civic Chamber of Russian Federation (2022, p. 100).

Karpunina (2022) analyzes data from families with disabled children to identify common features among disadvantaged families and the experiences of the disabled child within them. She emphasizes the closed nature of these families, their isolation, and the barriers hindering interventions from social protection institutions as significant factors contributing to social exclusion.

One effective means of aiding parents with disabled children is through offering them professional retraining opportunities, potentially incorporating flexible work arrangements. The task of caring for a child with disabilities requires specialized skills, knowledge, and a level of psychological preparedness akin to that of a full-time job. Acknowledging this reality, the Russian government endeavors supports such parents by offering avenues for early retirement. As per pension regulations, to qualify for this provision, parents must be actively caring for disabled children up to the age of eight. Mothers become eligible for early retirement at 50, while fathers are eligible at 55 (Koshkin, 2021).

Home visiting services, where families receive regular visits from a team of specialists to enhance the child’s social and psycho-pedagogical adaptation, are gaining popularity. During such visits, social and pedagogical services are provided, including corrective sessions and developmental games in a home setting involving other family members.

The research evidence shows that families with disabled children face specific issues such as social withdrawal and isolation, parental guilt, feelings of inadequacy among siblings, parents’ misconceptions about the child’s abilities, as well as limitations and barriers to accessing leisure and recreational opportunities. Additionally, family breakdown may also occur (Andriushchenko & Brusneva, 2021).

Psychological support for families with disabled children is primarily aimed at overcoming the significant stress experienced by parents. According to Dautova and Dikhanbaeva (2018), the birth of a child with disabilities disrupts the normative expectations in families, triggering changes across three key levels: psychological, social, and somatic.

At the *psychological* level, shifts occur in intra-familial dynamics. The arrival of a child inevitably alters the established relationship between spouses, irrespective of the child's health status. Mothers, in particular, are vulnerable to emotional exhaustion and depressive episodes due to hormonal fluctuations and the constant care demands of the infant. Some may grapple with unfounded guilt, further compounded by societal prejudices. It becomes crucial for parents to extend mutual emotional support and redistribute responsibilities amidst these new circumstances.

Socially, families tend to withdraw and become more selective in their interactions, potentially stemming from experiences of stigma, even from within their own extended family networks. There are also changes in the labor sphere as parents are adapting to their new socio-economic circumstances.

The *somatic* level encompasses the physical toll of stress on parental health. Specialists note heightened risks of hypertension, insomnia, migraines, and neurotic disorders among parents. Furthermore, as the child ages, accumulated stress may exacerbate health issues, particularly affecting maternal well-being over time.

Hence, psychological support for families with disabled children should target three primary aspects:

- creating a supportive microsocial environment within the family conducive to the child's development;
- addressing and enhancing the socio-psychological well-being and self-awareness of parents;
- cultivating constructive relationships with extended family members and close associates, fostering a positive outlook towards the child with a disability.

Various strategies for supporting families of disabled children aim to prevent and address social orphanhood. In 2021, Russia had 390,949 orphaned or parentless children (Podderzhka detei-sirot i detei, n.d.). While accurate statistical data on the proportion of disabled children among them is scarce, most analytical studies suggest that children with severe health impairments are adopted less frequently than their typically healthy counterparts.

As of June 2022, the federal database on children left without parental care revealed that over half (60%) had health statuses classified as groups 3, 4, and 5, indicating various degrees of severity of chronic illnesses (Rossiiskoe sirotstvo v tsifrah issledovaniia, 2022). Nearly half of the families unable to find a child to adopt in 2021 restricted their consideration to children with mild health conditions.

Methodology

This study draws from the results of the survey conducted by a research team from the Murom Institute (Branch) of the Vladimir State University. The study took place

in early 2024 at the Murom Rehabilitation Center for Children and Adolescents with Disabilities (Murom, Vladimir Oblast) and the Children's Support Center *Sozvezdie* (Vyksa, Nizhny Novgorod Oblast)¹. The aim of the survey was to identify the spectrum of socio-psychological issues and create a social profile of women raising children with disabilities in the Russian province. The survey involved 98 mothers of children attending these institutions.

The semi-structured questionnaire we used served several key objectives. Firstly, it helped us identify the most challenging aspects of life for families with atypical children. These included dimensions such as life satisfaction, assessment of government and societal support, factors contributing to mother stigmatization while raising disabled children, financial status, housing conditions, education, employment, and specific interests that mothers have regarding their disabled children.

Moreover, the questionnaire enabled us to explore a broad spectrum of problems associated with child upbringing and education. It shed light on issues related to medical and social support, as well as psychological and pedagogical assistance in the rehabilitation and socialization of children with disabilities.

For our study, the following key areas were selected:

Socio-psychological and socio-cultural factors:

- access to social support networks and the need for certain types of family assistance;
- subjective evaluation of well-being and the influence of attitudes and stigmatizing beliefs of people around them.

The resources and agency of a family with a disabled child:

- readiness for childbirth and child-rearing (barriers to childbirth, personal fears, goals, and moral attitudes);
- agency (engagement in active actions to improve one's own and others' well-being).

Social factors:

- barriers and opportunities for accessing education, conditions and opportunities for employment;
- the level of satisfaction or dissatisfaction with state support, types of necessary support.

Medical factors:

- access to and satisfaction with medical technologies and services for children with disabilities;
- availability and accessibility of rehabilitation programs.

Economic factors:

- the family's income level, access to social benefits;
- housing conditions;
- working conditions and opportunities for balancing family and professional roles.

¹ These centers provide rehabilitation services for children aged one month to eighteen years with various diagnoses, including cerebral palsy, Down syndrome, autism spectrum disorders, mild to moderate intellectual disabilities, hydrocephalus, and residual hearing and vision impairments.

Results

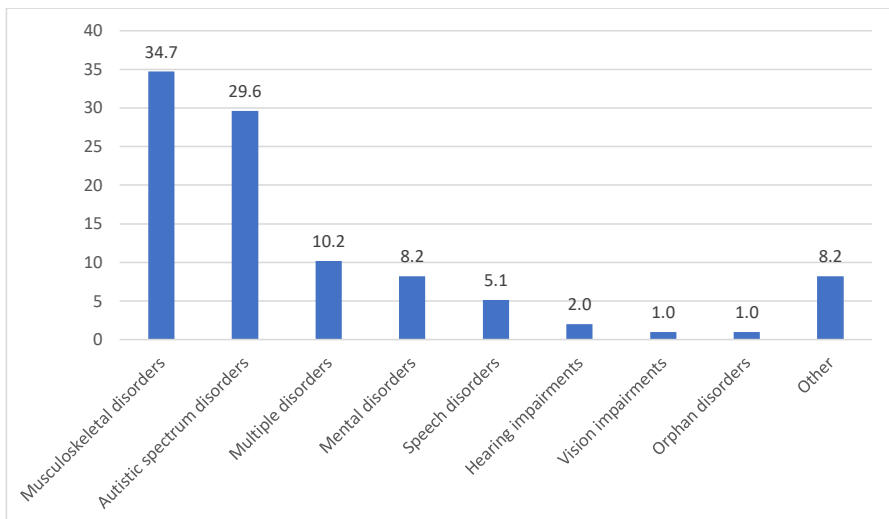
The study covered 98 mothers of children with disabilities. Respondents were aged 26–60, most of them (60%) were married and 10.2% were living in a cohabiting union, while the remainder were divorced or single-handedly raising children due to various circumstances (4.1% widows and 4.1% single mothers). Nearly half of the women have two children; 24.5% have one child, and 24.5% have three children. Only 2% of respondents have four or more children. On average, the surveyed families have one child with a disability, with only 2% of respondents raising two disabled children.

In our survey, we found that for most mothers, their child with health issues was their firstborn. Mothers who did not fall into this category often attributed the birth of a disabled child in their third or fourth pregnancies to factors such as “advanced maternal age” or “medical error.” Another significant aspect we explored was the question of whether women chose to have another child after giving birth to a disabled child. Our findings revealed that 32.7% of women opted to have another child, while 66.3% did not.

The age ranges of our informants’ children with disabilities varied: 13.3% were between 1 to 5 years old, 50% were between 6 to 10 years old, and 23.5% were between 11 to 15 years old. The remaining respondents cared for children aged 16 and older, as well as those deemed incapacitated due to the nature of their illness. Our informants’ children with disabilities span the following age ranges: from 1 to 5 years old (13.3%), from 6 to 10 years old (50%), and from 11 to 15 years old for 23.5% of respondents. The remaining respondents care for children aged 16 and older, as well as those deemed incapacitated due to the nature of their illness.

The nosological picture of childhood disability in the studied families is mainly represented by musculoskeletal disorders and autism spectrum disorders (Figure 3).

Figure 3
The Type of Illness or Condition of Children



Most commonly, the child's condition was diagnosed from birth (65.3%); in nearly a quarter of cases it was identified in early childhood; in preschool age, in 7.1% of cases; and in the youngest school age, in 2% of children.

Speaking of the child's status, 38.8% of mothers noted that the child had the status of "disabled child," which was assigned based on the conclusion of the Pediatric Medical-Psychological-Pedagogical Commission (PMPC) and the Medical-Social Expert Commission (MSEC). Additionally, 48% of respondents mentioned that their child had the "disabled child" status determined solely by MSEC. The remaining respondents are raising children with developmental differences but without an officially confirmed medical disability status.

The most important issues and relevant demands in medical and social assistance mentioned by our respondents are as follows:

- the child requires constant support, 55.1%;
- the child requires constant monitoring, 48%;
- the child cannot take care of themselves due to illness, 39.8%;
- the child constantly requires medication, 29.6%;
- expensive medication is constantly required, 19.4%;
- the child requires additional support equipment (such as a wheelchair or a lung ventilation device), 11.2%.

Of all the respondents, 10.2% reported that their children cannot move independently, and 5.1% of women emotionally expressed their concerns about "hopelessness of treatment," "understanding that neither I nor my child are needed by anyone," "poverty," and the "lack of any prospects for the child in life" (Trans. by Ekaterina Purgina—E. P.)

The set of questions concerning the accessibility of education and services provided by supplementary education institutions, as well as visits to cultural and leisure facilities helped us identify a serious problem inherent in the implementation of inclusive policies. Inclusion in education is crucial for successful integration of people with disabilities into social life. Nowadays, ensuring access to inclusive education for people with disabilities is a fundamental aspect of social policy. However, certain challenges still persist in the practice of educational inclusion.

The concept of inclusive education was initially introduced by the Federal Law No. 273-FZ *Ob obrazovanii v Rossiiskoi Federatsii* [On the Education in the Russian Federation], ratified on December 29, 2012. Article 2, Paragraph 27 of this law defines inclusive education as "ensuring equal access to education for all students, giving due regard to the diversity of special educational needs and individual capabilities" (Ob obrazovanii, 2012; Trans. by E. P.).

The law was further clarified when the status of "students with disabilities" (SWD) was established. It is important to distinguish this status from another one, that of "disabled," which is assigned by the MSEC. The status of a student with disabilities is determined by the PMPC, and thus it is not directly linked to the presence of disability. According to the law, a student with disabilities is "an individual who has deficiencies in physical and/or psychological development, confirmed by a psychological-medical-pedagogical commission and hindering the acquisition of education without special conditions being provided" (Ob obrazovanii, 2012; Trans. by E. P.).

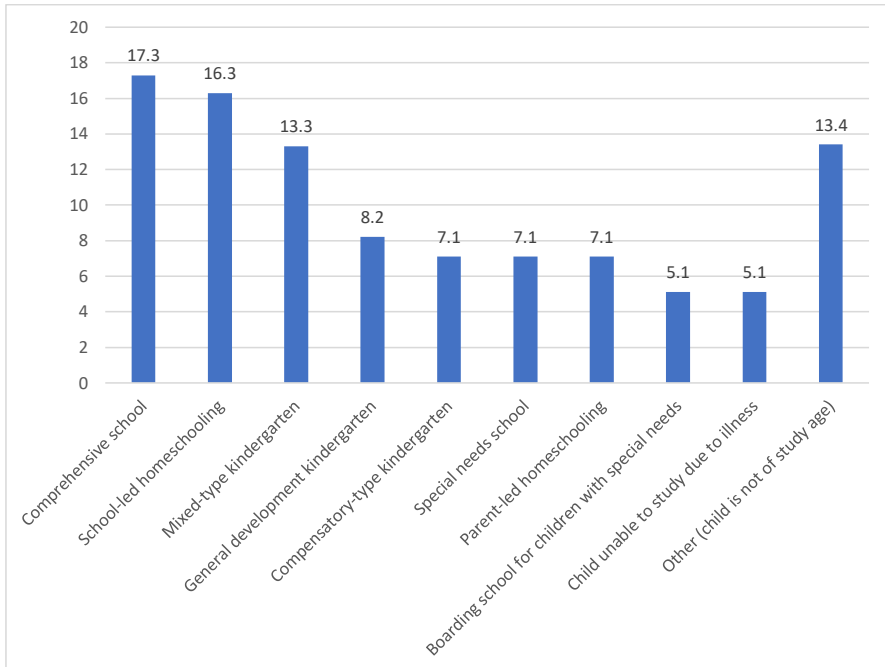
Furthermore, the law mandates the provision of special conditions for both students with disabilities and those with special educational needs (SEN). These conditions include the development of specialized education programs, the utilization of technical aids, access to special literature, and the implementation of pedagogical support technologies, among others (for a detailed description, see Article 79).

Educational conditions, including program content and pedagogical aspects, are determined, according to the law, by two documents: the Individual Rehabilitation Program (IRP) for students with disabilities, and the adapted educational program for students with special educational needs (Article 79). *The Adapted Educational Program (AEP)* is a program tailored for the education of individuals with disabilities, considering the nuances of their psychophysical development and individual capabilities. It may include interventions to address developmental challenges and promote social adaptation as needed.

The Federal Law No. 273-FZ *Ob obrazovanii v Rossiiskoi Federatsii* [On the Education in the Russian Federation] of 2012 abolished the concept of correctional (special) educational institution.

The majority of our respondents reported that children with disabilities do not have the opportunity for full inclusion in educational, leisure, and cultural activities due to various reasons, and this is by no means solely related to the child's health condition (Figure 4).

Figure 4
Involvement of Children With Disabilities in Inclusive Educational, Cultural, and Leisure Activities



Almost all children from the surveyed families attend clubs and extracurricular institutions, with sports sections and drawing clubs being the most common. For family leisure activities, parks (45.9%), shopping and entertainment centers (30.6%), cinemas (26.5%), and swimming pools (24.5%) are the preferred accessible options for visiting with a disabled child.

If we look at earlier public opinion surveys, dating back to 1991, we can see that they indicated a lower level of public awareness regarding the issues of education and socialization of disabled children. According to VCIOM² (Russian Public Opinion Research Center), 84.6% of respondents noted instances of injustice towards people with disabilities, but only 37.2% believed that inequality also extends to the sphere of education. Since problems faced by people with disabilities were rarely discussed in public discourse, the general public lacked an understanding of their educational needs and overall life experiences.

In surveys conducted in 2001–2002, respondents were already aware of these peculiarities. The studies revealed varying attitudes towards individuals with disabilities of different types. Children with musculoskeletal disorders were viewed most positively, while those with hearing and vision impairments received less favorable perceptions. Individuals with intellectual disabilities faced low loyalty and high detachment, as many respondents suggested they should only be educated in special (corrective) schools.

While the majority of surveyed parents (70%) supported the educational integration of children with musculoskeletal disorders, fewer than 40% of teachers shared this sentiment. For children with speech, hearing, and vision impairments, parental support for educational integration stood at 36%, compared to only 20% among teachers. Parents demonstrated greater acceptance of inclusive education compared to teachers: only 16% of educators expressed their readiness to teach in an inclusive classroom that includes children with musculoskeletal disorders, whereas 80% of parents were not opposed to such innovation (Iarskaia-Smirnova & Loshakova, 2003).

The study examining the subjective attitudes of parents with typically developing children towards children with disabilities and SEN in educational settings revealed the following: 30% of respondents expressed “pity and sympathy” towards children with disabilities, 20% indicated “dislike and repulsion,” another 20% reported “indifference,” while “kindness and friendliness” were felt by 20% of respondents. Additionally, 10% of respondents offered their own variations of responses (Fomina, 2021).

The resilience and agency of a family with a disabled child depend significantly on the availability of support channels and the family’s social capital such as extended family networks, community assistance, and involvement in social networks provided by parental non-profit organizations. Parents who actively seek social changes and are highly involved in their child’s socialization are typically those with a positive outlook on life and support from family and close relatives. However, traditionally, the full responsibility for care falls entirely on the parents of the disabled child.

² <http://sophist.hse.ru/db/oprview.shtml?T=S&S=974> (currently unavailable).

Approximately 27.6% of women stated they receive assistance from relatives living separately, while 22.4% receive help from family members. Additionally, 4.1% of respondents turn to the services of social workers, and 2% are compelled to hire caregivers, either nannies or attendants. Meanwhile, 41.8% of mothers strive to manage independently, primarily relying on their own efforts.

To gain a better understanding of the women's social background, we need to look at their level of education and professional experience. Women with disabled children often confront double discrimination in both employment and admission to educational institutions, stemming from their gender and family status. Consequently, mothers of disabled children constitute a unique demographic group, grappling with the repercussions of regional and gender disparities, alongside additional structural inequalities exacerbated by the constraints they encounter amidst ongoing social policy reforms.

A significant portion of women in our study, that is 27.6%, have completed secondary vocational education, 4.1% have completed primary general education, 5.1% secondary general education, and 8.2% primary vocational education (vocational school or lyceum). Fifty percent of women have completed higher education (Bachelor's, Specialist, or Master's degrees), while 5.1% have some college education but have not completed their degree. As many as 32.7% of women are officially employed full-time, 2% are informally employed, and 4.1% are self-employed.

An estimated 42.9% of mothers are not employed due to their caregiving responsibilities, while 12.2% work part-time. Additionally, 3.1% of respondents would like to have full-time employment but are currently unemployed. The remaining respondents are either retired or unable to work due to their own health conditions.

Employed respondents mostly work in the spheres of industry and manufacturing, healthcare, education, trade, and the service sector. Some women also mentioned engaging in activities such as "sewing children's clothing," "dressmaking," "raising goats and rabbits," "maintaining a garden to sustain our household," and "earning money by babysitting neighbors' children as I am at home anyway."

Economically, these families rely primarily on their spouse's (father's) salary, which serves as the main source of income for 68.4% of them. Additionally, for 64.3% of families, income comes from a monthly monetary allowance for the disabled child (or children). Of surveyed mothers, 44.9% indicated their own salary as a source of income, while 3.1% mentioned assistance from another family member residing with them, such as the disabled child's grandparents. As many as 11.2% of the respondents have side jobs.

Social benefits, payments, and subsidies also contribute to family income: 8.2% receive child support, 3.1% receive pensions, and 12.2% mentioned disability pensions for another family member. Additionally, 16.3% receive monthly child benefits when the per capita income is below the minimum living wage set in the region, and 3.1% receive other social payments. Only 1% of mothers receive financial assistance from relatives, acquaintances, or neighbors.

Only a small percentage of women consider themselves financially secure, indicating that they "have sufficient funds for comfortable living, major purchases

(such as a car or housing), and leisure” (3.1%). For 34.7% of mothers, they mentioned having enough money for essential expenses but need to save or take out a loan for major purchases and leisure activities. Similarly, another 34.7% stated that they have enough money only for basic necessities like food, clothing, utility bills, and medicine. More than a quarter of all respondents either “struggle to afford essential expenses related to food, clothing, bills, and medical treatment” (19.4%) or are forced to borrow money because they lack funds for these necessities.

Satisfaction with housing conditions varies depending on the place of residence. The majority of surveyed women live in administrative towns, with 9.2% residing in urban-type settlements, 9.2% in villages, and 6.1% in rural areas. Additionally, 7.1% of respondents live in larger cities with the status of a regional center. Nearly everyone has their own housing: 24.5% of women live in housing acquired by their family’s own means, 22.4% inherited housing, and 26.5% bought property through a mortgage. Of respondents, 21.4% live in houses or apartments owned by other relatives, while 4.1% rent or have social (municipal) housing. Regarding housing conditions, 30.6% reside in privately built houses with indoor sanitation facilities, while 2% live in private houses with outdoor amenities. While 13.3% of families live in a multi-story building with an elevator, 31.6% of respondents reported living in multi-story buildings without an elevator. Additionally, 7.1% of families live on the ground floor, 2% of families live in a one-room apartment in a private house, 8.2% reside in a two-room apartment, and 10.2% of families have three or more rooms in a private house.

Only 37.8% of mothers consider their housing fully suitable and comfortable for living with a disabled child. Whereas 31.6% consider their housing sufficiently comfortable for living with the disabled child, 9.2% of respondents reported their conditions being inadequately suited (arranged) for living with a disabled child. Notably, 18.4% of families independently adapted their housing to meet the needs of their disabled child.

To gauge the well-being of families with atypically developing children, we need to delve into concepts like discrimination, stigmatization, social exclusion, and community dynamics. These challenges are not only confined to cities but also affect small towns and rural areas. Of special interest in this respect are the studies that examine the factors influencing the formation of these phenomena. The theory of Erving Goffman (1963), who is one of the leading proponents of symbolic interactionism, helps us understand the mechanisms of impression management and the dramaturgy of life in families with disabled children. Additionally, his theory of stigmatization provides us with some insights into how individuals perceive each other. Michel Foucault’s (1975/1999) theory helps to look at social space from the perspective of disciplinary order and decipher the rules of social differentiation.

Our survey revealed high emotional fatigue among mothers raising disabled children. Of all the respondents, 86% experienced stigmatization, with 53.1% facing disapproval after their child’s birth. A total of 54% reported discrimination toward their child, and 37.8% had to face personal neglect and offensive behavior. Many reported being told that mothers who give birth to a disabled child should not have any more

children. Many mothers (58.2%) indicated that there were instances when those around them expressed the opinion that disabled children are a “burden on the family” and that they “do not contribute anything useful to society” (55.1%).

Almost half of the women in the study have heard at least once the opinion that disabled children should live and be raised separately from other (typically developing) children.

The situation becomes even worse when it comes to the reproductive rights of disabled children and the mothers of such children. 39.8% of women have encountered quite aggressively and emotionally charged opinions from those around them that disabled individuals should not have offspring, while 25.5% of mothers have faced similar remarks directed towards themselves.

In respondents' own words, these opinions are often articulated the following way:

“Freaks of nature should be banned from reproducing,” “invalids are burdens on the state's neck,” “they give birth to invalids on purpose, to receive benefits” (Trans. by E. P.).

Women experience discrimination in almost every sphere of life: in healthcare and social protection systems, when they are forced to defend their own rights and the rights of their children to access necessary information, treatment, services of specialists, material assistance as provided by law; in education and employment, being compelled to forgo education and professional development, lowering wage and job requirements to raise their children; in social relations and from the government, imposing on them a sense of guilt for giving birth to disabled children, fostering a sense of powerlessness in society and the state.

In every aspect of public life, women with disabled children face the burden of dual inadequacy, as their reproductive and economic roles come under scrutiny. The stigma surrounding these women contributes to feelings of guilt in half of them for giving birth to a disabled child, with 7.1% even admit considering abandoning their child. These thoughts and emotions arise amidst profound emotional fatigue and depression, leading to 33.7% of mothers feeling guilt and shame for having such thoughts:

I feel exhausted and drained ... sometimes I just want to cry, I'm so tired ... there's no light at the end of the tunnel, it's the same thing every day, day in and day out ... I'm so tired that sometimes I fall asleep without even taking off my robe ... I don't see any joy in life when I'm tired, I dream of spending at least one day without laundry, cooking, or massages for my son ... sometimes I feel like I'm slowly losing my mind, my day is like Groundhog Day ... I ask myself, what have I done to deserve this? Why did he [God] punish me? (Trans. by E. P.)

A total of 48% of mothers report experiencing physical fatigue daily, and the same percentage (48%) stated that they experience psychological fatigue daily as well. At the end of the week, 34.7% of women feel physical fatigue, and 19.4%, psychological fatigue (Table 1).

Table 1
Stress and Feelings of Distress

Responses to the question: “What symptoms of stress do you experience?”	Responses	%
Irritability	62	63.3
Fatigue	61	62.2
Mood swings	48	49.0
Sleep disorders	47	48.0
Headaches	46	46.9
Anxiety	41	41.8
Forgetfulness (memory problems)	38	38.8
Increased irritability, feeling of anger	29	29.6
Hair loss, dry skin	16	16.3
Lack of joy and hope	15	15.3
Feeling tearful and moody	14	14.3
Eating disorders	14	14.3
Depression	12	12.2
Loss of will to live	5	5.1

At the same time, 35.7% of respondents benefit from specialist psychological assistance, 50% receive support from family and relatives, 57.1% find understanding from friends and acquaintances, 17.3%, from work colleagues, while 6.1% reported having no support.

It should be noted, however, that despite the difficulties, complexities, and problems, the majority of survey participants responded that they are “happy to be mothers”: “When you see your child smile, you understand that it’s worth living for” (Trans. by E. P.).

As many as 36.6% of mothers want more children if they receive sufficient financial support from the state (11.2% of respondents). The reasons why mothers do not plan to have any more children are listed in Table 2.

Table 2
Factors Affecting Respondents’ Decisions to Have More Children
(Gathered From Research Findings)

Responses to the question: “Would you like to have one more child?”	Responses	%
No, because of psychological fatigue and emotional burnout	28	28.6
No, because of financial constraints	17	17.3
No, because I’m afraid of having another child with a disability	16	16.3
No, because I’m a single mother	14	14.3
No, because I am struggling to raise a disabled child.	9	9.2

Table 2 Continued

Responses to the question: “Would you like to have one more child?”	Responses	%
No, because I don't have enough support from my relatives and friends	9	9.2
No, because of the lack of proper medical care	6	6.1
Yes, I'm planning to have another baby	11	11.2
Yes, I plan to have two more children	1	1.0
I would like to have more children provided I get state financial assistance	11	11.2
I would like to have more children if I had help from my family and friends	7	7.1
I'd consider having more kids if I had professional help	5	5.1

However, around 12% of women plan to give birth to another child or several more, and about 20% would have wanted this if they had financial assistance from the state, as well as support from relatives.

Conclusions

The well-being of families with disabled children hinges, firstly, on their internal resources, such as human and social capital, and support from extended family networks. Their ability to advocate for rights, join parent groups, and receive support from religious communities also impacts their well-being.

Secondly, an important role is played by external resources, including those provided by social protection institutions and other organizations equipped to aid families with atypically developing children. Their function is to determine whether the requests align with regulatory requirements and facilitate the provision of assistance to the family.

Thirdly, the living conditions of families are influenced by socio-cultural factors, such as the level of acceptance or stigmatization from their community, as well as the prevalence of discriminatory stereotypes regarding disability and mothers of disabled children.

Attitudes toward disability are evolving towards inclusion and inclusive development. However, there is still much social resistance, especially within social institutions. This resistance is apparent in the gap between legislation supporting inclusive education and the actual implementation of educational and nurturing services for disabled children. Families with children who have mental differences, like autism spectrum disorders, encounter these obstacles more frequently than those with physical differences.

Our analysis of the social status of mothers of disabled children on a microlevel enables a deeper understanding of the daily challenges these women face. It also helps us identify mechanisms in social welfare and support systems that contribute to or perpetuate inequality and social distress. In everyday practices and communications,

the assumption that the birth of a disabled child is a consequence of the mother's own marginalization is often revealed.

The problems of socialization of disabled children, household disarray, difficulties in the professional realization of women with disabled children, single-parenthood, psychological and emotional burnout, and physical fatigue generate serious personal issues for women. These issues exacerbate the stigma of disability and provoke negative social attitudes towards inclusion as a whole.

Meanwhile, the situation of women residing in provincial cities is even worse compared to that of residents of regional centers and megacities, where there are more opportunities to gain resources and receive social, psychological, and material assistance.

The arrival of a child invariably alters the established dynamic between spouses, regardless of the child's health. Additionally, mothers often face heightened emotional strain and may experience depressive symptoms due to hormonal changes and the continuous care required for the infant. Some mothers may also grapple with unwarranted feelings of guilt associated with having a child with special needs, often exacerbated by social prejudices.

Our study confirms that mothers of children with disabilities are more prone to stress-related physical ailments such as hypertension, insomnia, migraines, and neurotic disorders. Furthermore, as the child grows older, accumulated stress may lead to the emergence of severe health issues in some mothers as they age.

As far as social and medical assistance is concerned, families with a disabled child face several significant challenges and demands, including the constant need for support and monitoring for the child due to their condition. Another significant obstacle arises from the child's inability to independently care for themselves, along with the need for costly medications. Additionally, families often require additional support, including specialized equipment such as wheelchairs or artificial lung ventilation apparatus.

The resilience and agency of a family with a disabled child depend significantly on the availability of support channels and the family's social capital, e.g., extended family networks, community assistance, and involvement in social networks provided by parental NGOs. Parents who actively seek social changes and are highly involved in their child's socialization typically have a more positive outlook on life and enjoy support from family and close relatives.

The socio-economic profile of women with disabled children indicates that for most families raising such children, the primary income source is the spouse's (father's) salary or a monthly allowance for the disabled child (or children). A quarter of those surveyed either find it difficult to afford essential expenses like food, clothing, bills, and medical treatment, or they are compelled to borrow money due to insufficient funds for these necessities.

To grasp the discomfort and psychological strain experienced by families with atypical children, we need to delve into concepts like discrimination, stigmatization, social exclusion, and community attitudes. Our survey detected a high level of emotional fatigue among mothers of disabled children, as can be seen from their

responses to questions about emotional burnout, fatigue, guilt, and social issues. Nearly all participants encountered instances of stigmatization, with the majority facing judgmental reactions and experiencing discrimination and offensive attitudes towards their child from others.

Caring for a child with a disability requires specific skills and knowledge, as well as psychological readiness, akin to full-time employment. Recognizing this situation, the Russian government offers support to such parents by providing early retirement options. Social-psychological support for families with disabled children should primarily focus on helping parents overcome the stress they experience. The birth of a disabled child often disrupts the family members' normative expectations, causing changes in the family on psychological, social, and somatic levels.

Families with disabled children often face a shortage of resources, but this can be compensated by state and non-state institutions. State support, including subsidies and preferential lending, is provided through federal and regional programs. As for NGOs, our research indicates that families do not always seek assistance from such specialized organizations and funds, which happens for two main reasons: firstly, the scarcity of NGOs, especially in peripheral parts of the country; and secondly, families' limited awareness of or trust in these institutions.

To improve the socio-psychological well-being of families with disabled children, it is important for family members to be able to access and use available resources effectively. Overcoming stigmatizing socio-cultural attitudes requires fostering supportive institutional conditions and highlighting successful examples of families raising disabled children through relevant channels.

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ARTICLE IN THE SPECIAL SECTION

“Who if Not a Mother?”: Development of Parental Leave Design in Russia

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ABSTRACT

There is an established system of parental leave in Russia. According to the legislation, parental leave can be used not only by the mother, but also by the father or other relative of the child. Nevertheless, men rarely use this right; according to statistics, only 2% of Russian fathers go on parental leave instead of their spouse. The paper seeks to identify the underlying causes of this situation. To study the problem, we conducted a series of in-depth semi-formal interviews with mothers and fathers whose families were eligible for parental leave at the time of the study ($n = 30$). We have identified the perception of this stage of family life by both parents (as a “leave-work” or “leave-vacation”), the reasons for fathers’ refusal to actively engage in the situation, including the likelihood of mothers’ unwillingness to let fathers be involved. The reasons are classified into objective and subjective. Gender stereotypes are revealed from two positions: female and male. The results of the study indicate the need to transform the current system of parental leave in Russia and purposefully work with public opinion in this area.

KEYWORDS

parental leave policy, leave-taker, motherhood, perception of parental leave, transformation of parental leave, parental labor

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Introduction

The regulation of parental leave is attributed an important place in the social policy of many countries. It includes policies on different types of vacations, their duration, the system of parental payments and the possibilities of flexible use of vacations. The main purpose of parental leave is to preserve the workplace and salary for an employee who takes a break from work to devote time to family and children. However, parental leave is much more important than it might seem at first glance. Thus, the parental leave system, being part of family policy, is closely linked to a number of other policies: employment policy, gender equality policy, demographic policy, and policy of benefits.

Although in some countries parental leave can be used not only by the mother, but also by the father of the child, most often, it is women who use this right. Pregnancy, childbirth, and subsequent maternity leave exclude women from the professional environment for a long time. Researchers claim that women lose a significant part of their professional skills and competencies during long vacations (Gangl & Ziefle, 2009). Longer parental leave can negatively affect career prospects of parents and their professional adaptation (Valentova, 2019). Moreover, extended parental leave can be detrimental to a woman's career, provoking a decrease in her income in the future (Rossin-Slater, 2017).

An increase in the period of parental leave can lead to stronger gender inequality as parents may be labeled with a certain "specialization" within the family. This specialization encourages mothers to do housework and fathers to increase their working hours (Canaan, 2022). However, the very formation of such a specialization is not related to the duration of leave. Its causes are deeply rooted in those institutional factors and social attitudes that determine the gender contract, namely existing cultural values (Lidbeck & Boström, 2021) and stereotypes regarding the roles of "male breadwinner," "female housewife" (Doucet, 2004; Lomazzi et al., 2018). Researchers argue that traditional load sharing can reinforce the feelings of injustice and role overload, especially among mothers who adhere to more egalitarian attitudes and are focused on building a career (Yavorsky et al., 2015).

Biological differences between men and women can also affect the distribution of parental burden in the family. Due to the child's need for a mother and breastfeeding, it is the woman who is most often with the child in the very first months of their life. Compared to maternal activity, the parental contribution of fathers seems minimal (Schober & Zoch, 2019). For this reason, fathers may feel disconnected from family life (Chalmers & Meyer, 1996). In this context, the involvement of fathers in the upbringing of a child can be considered as a factor of family well-being, suggesting a more even distribution of parental responsibilities between spouses.

To reduce the gender imbalance within the family, some countries introduced paternity leave, which is designed to enhance paternal involvement in the childcare process (O'Brien, 2005). Moreover, such leave contributes to the involvement of fathers in household functions (van Belle, 2016). According to research, paternity leave, as well as the possibility of using parental leave by both parents at the same

time, positively affect the degree of participation of fathers in the child rearing not only directly during leave, but also throughout the child's life (Bünning & Pollmann-Schult, 2016). Signs of caring masculinity are increasingly observed among modern fathers as parental values and the practice of active participation in the child rearing are integrated into male identity, without leading to degradation of male status (Brandth & Kvande, 2018). Notably, the parental role of fathers in some countries has recently increased, and men have begun to take a more considerable share of parental and household responsibilities (Johansson, 2011).

In Russia, the number of studies focused on parental leave is not very large. Some of them explore the involvement of fathers and the possibility of spreading paternal leave, but researchers mostly conclude that in Russian society, due to the predominance of traditional patriarchal values, paternal leave is unlikely to become popular (Almazova & Il'inykh, 2015). A gender disbalance in the distribution of household duties during leave, as well as the decreasing well-being of families while they are on leave are some of the reasons why families do not make the new reproductive decisions (Abbasov et al., 2020; Moreva & Sanochkina, 2020).

State regulation of parental leave (including deterrence or promotion of gender equality) plays an important role in creating an environment that determines intra-family interaction (Evertsson, 2016). To overcome the gender imbalance in the domestic sphere, a number of conditions provided by the state are necessary: a developed system of child care services, the infrastructure of children's institutions, social protection of families with children, promotion of equal participation of spouses in the process of raising children (Rocha, 2021). Parental leave policies, including a well-paid leave of moderate duration for mothers, encourage fathers to use leave and mothers to return to the labor market, thus having a positive effect on the division of domestic and parental roles between spouses (Patnaik, 2019).

In Russia, parental leave system includes two types of leaves involving period for pregnancy and childbirth (maternity leave) and childcare leave (parental leave). These leaves are regulated by the Labor Code of the Russian Federation (Trudovoi kodeks, 2001). The duration of maternity leave is 140 days (usually 70 days before childbirth and 70 days after childbirth). The maternity leave benefits amount to 100% of the average wage. Parental leave is granted to a parent or one of the child's relatives until children reach the age of three, but only half of this period is well-paid (40% of the average salary for the last two years). After the child reaches the age of 18 months, the allowance is paid only to low-income families. Most notably, parental leave in Russia can only be used by one person, both parents cannot take it at the same time. However, they can take turns using parental leave, replacing each other an unlimited number of times. While on paternal leave, a parent can work part-time or remotely, which allows continuing professional activities and receiving parental benefits. Apart from the mother and the father, other relatives (grandmother, grandfather) or a guardian who takes care of the child can go on parental leave. Although paternity leave as such is not stipulated in Russian legislation, men have a right to take advantage of parental leave fully or partially. However, this practice is not popular, and only 2% of fathers use parental leave.

The study aims to identify and characterize the models of participation of both parents in the child rearing during parental leave that have developed in Russian society.

Methods

As a source of information, we used semi-formal interviews with parents who had one of the family members on parental leave. A total of 30 respondents from seven regions of Russia were interviewed: Sverdlovsk Oblast, Moscow, Perm Krai, Komi Republic, Chelyabinsk Oblast, Khanty-Mansi Autonomous Okrug, and Samara Oblast. To recruit respondents, we applied the snowball sampling technique.

The structure of informants by the level of education is as follows: 20 respondents have higher education, seven have secondary vocational education, and three have secondary education. Two informants live without a partner (only with children), two live with their parent, the rest with partners. The interview was attended by parents aged 20 to 42 who have one (24 informants), two (four informants) or three children (two informants). Half of the informants (15) worked in public institutions before parental leave, 12 in private organizations, three did not work (Table 1).

Table 1
Socio-Demographic Characteristics of Informants

Informant No.	Gender	Age	Occupation before leave	Education	Marital status	Number of children	Region
Informant 1	Female	30	Occupational safety and health administrator	Higher	Married	1	Sverdlovsk Oblast
Informant 2	Male	26	Government worker	Higher	Married	1	Moscow
Informant 3	Male	25	Local government worker	Higher	Married	1	Moscow
Informant 4	Female	25	Teacher	Higher	Married	1	Sverdlovsk Oblast
Informant 5	Female	28	Manager	Higher	Married	1	Moscow
Informant 6	Female	24	Teacher	Higher	Married	1	Moscow
Informant 7	Female	25	Manager	Higher	Married	1	Sverdlovsk Oblast
Informant 8	Female	24	Manager	Higher	Married	1	Sverdlovsk Oblast
Informant 9	Female	27	Medicine worker	Secondary vocational	Married	1	Sverdlovsk Oblast
Informant 10	Female	28	Medicine worker	Secondary vocational	Divorced	1	Sverdlovsk Oblast
Informant 11	Female	29	Teacher	Secondary vocational	Married	1	Sverdlovsk Oblast

Table 1 Continued

Informant No.	Gender	Age	Occupation before leave	Education	Marital status	Number of children	Region
Informant 12	Female	22	Manager	Higher	Married	1	Sverdlovsk Oblast
Informant 13	Female	22	Medicine worker	Secondary	Married	1	Moscow
Informant 14	Female	29	Medicine worker	Higher	Married	1	Sverdlovsk Oblast
Informant 15	Female	23	Manager	Higher	Married	1	Sverdlovsk Oblast
Informant 16	Female	28	Local government worker	Higher	Married	1	Komi Republic
Informant 17	Female	24	No prior experience	Secondary	Cohabiting	2	Perm Krai
Informant 18	Female	25	Teacher	Higher	Married	1	Komi Republic
Informant 19	Female	26	Store assistant	Secondary vocational	Cohabiting	2	Perm Krai
Informant 20	Female	30	Post office worker	Secondary vocational	Cohabiting	3	Perm Krai
Informant 21	Female	28	Teacher	Higher	Married	1	Chelyabinsk Oblast
Informant 22	Female	20	No prior experience	Secondary vocational	Divorced	1	Sverdlovsk Oblast
Informant 23	Female	23	No prior experience	Secondary	Married	1	Sverdlovsk Oblast
Informant 24	Female	42	Sales executive	Higher	Cohabiting	2	Samara Oblast
Informant 25	Female	34	Engineer	Higher	Married	3	Sverdlovsk Oblast
Informant 26	Female	33	Manager	Higher	Married	1	Khanty-Mansi Autonomous Okrug
Informant 27	Female	29	Teacher	Higher	Married	1	Sverdlovsk Oblast
Informant 28	Female	40	HR manager	Higher	Married	2	Sverdlovsk Oblast
Informant 29	Female	31	Teacher	Secondary vocational	Married	3	Chelyabinsk Oblast
Informant 30	Female	30	Teacher	Higher	Not married	1	Sverdlovsk Oblast

The article analyses the detailed answers of informants to questions about their associations with the category of parental leave; with making a family decision on what family member will use the right to leave; with the factors that influenced this decision; and with the difficulties that arise in the family during this period.

Results

According to Russian labor legislation, leave is one of the types of rest time. It is believed that at that time the employee is relieved of their professional duties and spends their free time on rest and recuperation. For this reason, society often equates the word “leave” with “vacation”. The results of the interview indicate that such identification is erroneous in the case of parental leave. Almost all informants categorically stated that maternity leave is far from a vacation. According to parents, raising children during leave is an intensive work that requires a lot of physical, time, and emotional costs:

Well, no, of course **it’s not a vacation**. It’s a break from work, yes. You don’t have to get up for work every morning, go to work. And I would not call maternity leave a vacation. You change the field of activity from one to another. (Informant 20, 10- and 6-year-old sons, 18-month daughter; Trans. by Anna Bagirova, Natalia Blednova, & Aleksandr Neshataev—A. B., N. B., & A. N.)

It’s **still a job**. You teach them [the child] to be an individual, to respect the feelings of others. You need to spend time, explain, convey, inspire. People think it’s a vacation because mom’s not at work. But all the work is at home (changing diapers, sitting, cooking), you do something all day long. (Informant 12, 1.5-month-old daughter; Trans. by A. B., N. B., & A. N.)

The “leave-work” perception is typical for almost all parents. The informants pointed out the high intensity of work during this period, its routine, constant nature, and a lack of a change between work and rest regimes. However, despite the fact that the informants talked about the complexity of such leave and the enormous workload associated with it, they admitted that they would remember this period as positively colored, with excitement and warmth (Table 2).

Table 2
Parents’ Perception of Parental Leave

Informant	Perception (leave-work/leave-vacation)	Assuming future impressions from leave
2	I really think it’s a type of labor , when you’re working on raising a new person. On our shoulders, spending your health, money, and emotions, we raise, invest in this new person ... This is not a vacation at all, it is a titanic work (Trans. by A. B., N. B., & A. N.)	All the hardships are erased from my mind ... Even now, if you rewind a year ago, our child was 1–2 months old, yes, it was difficult, but now those bright difficult emotions have already gone out, and you remember it more calmly (Trans. by A. B., N. B., & A. N.)
4	This is a different kind of work , not the kind that is at work. Well, here the work is like this ... when all spheres interact. That is, it is both physical, moral, and social. All parties are interconnected and interact with each other. This is a colossal job (Trans. by A. B., N. B., & A. N.)	Well, I probably won’t remember it as a difficult period. This load is all forgotten , somehow reset, and again and again you are full of strength and energy (Trans. by A. B., N. B., & A. N.)

Table 2 Continued

Informant	Perception (leave-work/leave-vacation)	Assuming future impressions from leave
7	This is not a vacation in any way. A vacation is still something about relaxing. And here there is no rest at all . There is parenting and communication, childcare (Trans. by A. B., N. B., & A. N.)	I will definitely remember this period with warmth (Trans. by A. B., N. B., & A. N.)
9	Well ... up to a year it's probably hard. For up to a year, it seems that you are in hell , you have the same thing every day. I wouldn't say it's a vacation ... well, after a year, it's a vacation (Trans. by A. B., N. B., & A. N.)	There will be all sorts of memories. You don't even seem to remember all this. And you're even ready to give birth to more ... Then you still realize that there are difficulties, you can't escape them, but what happiness it is : a little child running around like that, a copy of you or a copy of your husband (Trans. by A. B., N. B., & A. N.)
11	Of course, this is not a vacation . It's very hard. Well, now, of course, I feel better. Because she's grown up anyway, I already know what she wants (Trans. by A. B., N. B., & A. N.)	No, I will not remember the period of infancy, especially the first six months, as some kind of miracle, some kind of euphoria . Everything that happened after the hospital ... Well, I can't explain it. I felt like I hadn't eaten anything at all. I didn't sleep, I lost fifteen kilos (Trans. by A. B., N. B., & A. N.)
16	Well, this is not a vacation . Well, for example, we go somewhere to the village, it's a rest, a change of scenery. We went to the sea. It's also like a vacation for men (Trans. by A. B., N. B., & A. N.)	I think there will be good memories . The bad is always forgotten, but only the good remains in memory (Trans. by A. B., N. B., & A. N.)
29	I can't say that maternity leave is a permanent vacation. It's the same kind of work, only it goes 24/7 . There is not much rest in maternity leave. It's more about taking care of your child 24/7 so that the child is safe (Trans. by A. B., N. B., & A. N.)	After 1.5 years, you rush to work, and then you think that it would be better to be on leave for up to 3 years to extend this period (Trans. by A. B., N. B., & A. N.)
24	No, it's a break from work, but it's not a vacation like that in the concept of vacation ... To feel like I'm on some kind of huge vacation, there's no such thing (Trans. by A. B., N. B., & A. N.)	You get pleasure from the child. Therefore, their emotions mean a lot. Of course, I think I'll remember it as a good period (Trans. by A. B., N. B., & A. N.)
23	In general, this is not a vacation for me . There are such easy days when you rest ... Nevertheless, you get mentally tired and realize that you are not relaxing completely (Trans. by A. B., N. B., & A. N.)	I think that I will remember it with warmth, with love , with such nostalgia. Like I wish I could go back. I think it will be like this (Trans. by A. B., N. B., & A. N.)
26	Well, I can't say that maternity leave is a vacation. That is, it is unlikely that this has anything to do with rest, rather it is some kind of adaptation to a new period in your life (Trans. by A. B., N. B., & A. N.)	Even now, we recall many moments that happened before the baby was born and when she was born, the first months, and I think that we will always remember them. With warmth, with love (Trans. by A. B., N. B., & A. N.)

Some mothers evaluate the work done on maternity leave as even more challenging compared to professional activities in the labor market. Notably, this position is held by mothers who are focused on their career, satisfied with their work, and plan to return to the labor market before the three-year deadline established by law (or already continue their professional activities while on maternity leave). On the contrary, parents who are not satisfied with their professional sphere tend to consider paid work more difficult, as on maternity leave they take a break from unloved work, tight deadlines, and stress (Table 3).

Table 3
Comparing Professional Labor and Work During Maternity Leave

Category	Codes
Maternity leave is harder than professional labor	<p>I worked at school, it's easier than leave ... Well, I love my job, so to speak. That is, I would return maybe next year (Informant 4, 7-month-old daughter; planning to return to work from maternity leave in 6 months; Trans. by A. B., N. B., & A. N.)</p> <p>As for me, it's more difficult than work. You fulfill your work responsibilities, come home, and relax. On maternity leave, it's around the clock. I would like to return to work as soon as possible ... I want to go out into the world and earn money (Informant 5, 11-month-old daughter; planning to return to work in 9 months; Trans. by A. B., N. B., & A. N.)</p> <p>Well, it's much harder here than going to work [smiles]. This is definitely a job. Well, it's just a 24/7 job. This is not a 5-by-2 schedule. It's hard ... You're leaving for another job, only a more difficult one (Informant 6, 1-year-old son; planning to withdraw from leave in a year; Trans. by A. B., N. B., & A. N.)</p> <p>This is not a vacation at all [laughs]. I think I'm working 24/7 ... My mind doesn't rest at all, after all. It's focused on the child and him not falling, not slipping, not hitting himself. It would be better if I worked not five, but six days. I could work from eight to five, and came home and relax (Informant 10, 2-year-old son; already working; Trans. by A. B., N. B., & A. N.)</p> <p>This is not a vacation. It's a job. When you rest, you have to rest. It's easier to work, at least there are days off at work. But not on maternity leave (Informant 1, 4-month-old son; already working; Trans. by A. B., N. B., & A. N.)</p>
Working on the labor market is harder on leave	<p>I worked there for 15 hours at my job and didn't get much sleep. Similarly, nothing is different here. I even seem to rest more now [laughs] than I did when I was working (Informant 13, 2-month-old son; Trans. by A. B., N. B., & A. N.)</p> <p>On maternity leave, I take a break from deadlines, strict rules inherent in work and educational activities. With a child, there is an opportunity to spend time for pleasure, walk, chat, etc. ... A child is like a hobby, it is difficult, but it brings pleasure (Informant 17, 6-year-old daughter, 2-year-old son; Trans. by A. B., N. B., & A. N.)</p> <p>I'm taking a break from my job, which I didn't want to return to. From contests, work activities. No, this is not a difficult period. I feel comfortable being home, even with a child, but I do my own thing, what I like (Informant 18, 18-month-old son; Trans. by A. B., N. B., & A. N.)</p> <p>I'm taking a break from work. Because it is stressful, very psychologically stressful. I enjoy household duties, a child, motherhood, the understanding that this will not happen again in my life, the first steps, the first smiles. I literally take a break from work, I can't get enough of it (Informant 28, 10-year-old and 11-month-old daughters; Trans. by A. B., N. B., & A. N.)</p> <p>I'm taking a break from work at the moment... The last time I worked in a grocery store called <i>Red and White</i>. And there are a lot of people coming. That is, you have to communicate with them, smile forever, and so on. Should I say that I want to have another baby and will I still give birth? Yes, I don't mind (Informant 19, 7-year-old daughter, 6-month-old son; Trans. by A. B., N. B., & A. N.)</p>

When asked what family member should be on maternity leave, the informants most often answered very unequivocally: each family should decide individually and do what is convenient for both parents. However, when asked why it was decided in their family to give the right to leave to their mother, almost everyone replied that there was not even a choice, since this option is assigned to a woman “by default”: “Well, we didn’t even discuss it. This is **obvious that the mother is on maternity leave**. Well, even if we were discussing this, I would definitely go anyway” (Informant 6, 1-year-old son; Trans. by A. B., N. B., & A. N.). “We **didn’t even discuss with my husband** who would go on maternity leave, I just went and that was it” (Informant 27, 9-month-old son; Trans. by A. B., N. B., & A. N.).

We have classified the objective and subjective reasons for a woman taking maternity leave (Table 4). Objective factors include the level of income (as a rule, men’s income is higher, so families make an economically rational choice by sending their mother on maternity leave), physiological characteristics of women (the need to breastfeed a child), the need for the female body to recover after childbirth. Subjective factors include traditional gender stereotypes and attitudes instilled by the family, maternal sense of ownership, mother–child bond. Fathers’ passivity during maternity leave may also be explained by mothers’ distrust of their spouses. Many women believe that they can handle a child better than their husbands. Such an idea is an element of the stereotype about fixed gender roles (a woman is a housekeeper and a man is a breadwinner, whose degree of “masculinity” is determined not by the activity in the domestic sphere, but by success in the labor market). It exists even in the case of parents’ vocalized orientation towards egalitarian values.

Table 4

Reasons for Using the Right to Maternity Leave Mainly by Mothers

Category	Subcategory	Codes
Objective reasons	Men have higher income	It’s just that in our case, Artem [husband] has a higher salary . Therefore, me going on maternity leave was inevitable (Informant 1, 4-month-old son; Trans. by A. B., N. B., & A. N.) This is the financial side because his salary is higher, several times higher than mine (Informant 4, 7-month-old daughter; Trans. by A. B., N. B., & A. N.) Well, it’s inconvenient for dad, financially unprofitable to be on leave (Informant 16, 1.7-month-old son; Trans. by A. B., N. B., & A. N.)
	Breastfeeding	Well, if you breastfeed , then how you will pump (Informant 1, 4-month-old son; Trans. by A. B., N. B., & A. N.) Mom of course! If she’s breastfeeding , then dad won’t be there. We even talked about it with him (Informant 18, 18-month-old son; Trans. by A. B., N. B., & A. N.)
	Need for recover after giving birth	I also need time to recover after pregnancy and childbirth (Informant 26, 1-year-old daughter; Trans. by A. B., N. B., & A. N.)

Table 4 Continued

Category	Subcategory	Codes
Subjective reasons	Attitudes originating in the previous generations	<p>This is also a matter of upbringing in our families, so to speak, the concept that a child should be with the mother [thinks]. These are some kind of laid-down family things, the basics (Informant 2, 1.2-year-old son; Trans. by A. B., N. B., & A. N.)</p> <p>I believe that a man should earn money and provide for his family. Well, that's because I've had such an example since childhood (Informant 20, 10- and 6-year-old sons, 18-month daughter; Trans. by A. B., N. B., & A. N.).</p> <p>We didn't really discuss it, it's just as if it were a matter of fact ... Well, that is, in my family my mother was on maternity leave, my father was earning money. And I had such an example in front of my eyes, and for me it seemed to be normal (Informant 23, 6-month-old daughter; Trans. by A. B., N. B., & A. N.)</p>
	Dominating gender stereotypes that are not subject for discussion	<p>Well, there weren't even any questions here [laughs], that is, we probably have such conservative views: a man works, a woman takes care of a child (Informant 8, 4-month-old son; Trans. by A. B., N. B., & A. N.)</p> <p>Well, because for me the most important thing is for a man to work, to earn money. This is his only duty in this life, in my opinion (Informant 13, 2-month-old son; Trans. by A. B., N. B., & A. N.)</p> <p>Somehow it wasn't even discussed. I don't know. It seems to me that this is how everyone is assigned. He's just a man, a breadwinner, and I'm the keeper of the hearth (Informant 19, 7-year-old daughter, 6-month-old son; Trans. by A. B., N. B., & A. N.).</p> <p>Mothers always go on maternity leave, so this issue was not particularly discussed in our family, that dad can go on maternity leave. In our family, the husband earns money, and the mother brings up the children. That's it (Informant 29, 12-year-old and 6-month-old sons, 4-year-old daughter; Trans. by A. B., N. B., & A. N.)</p> <p>This is not even discussed in our family. Dad is a real man; he earns money like a breadwinner. Mom is the keeper of the hearth, brings up the children, and he takes part (Informant 28, 10-year-old and 11-month-old daughters; Trans. by A. B., N. B., & A. N.)</p>
	Distrust of father	<p>It was important for me to plunge into motherhood, even despite all the difficulties, I do it better than my husband (Informant 5, 11-month-old daughter; Trans. by A. B., N. B., & A. N.)</p> <p>I don't trust him. We have, as it were, an understanding that, as a woman gives birth to a child, she breastfeeds. But I believe that a woman is still a woman, especially at this young age, of course, a woman is more needed (Informant 24, 12-year-old and 8-month-old sons; Trans. by A. B., N. B., & A. N.)</p>

Category	Subcategory	Codes
Subjective reasons	Maternal sense of belonging	In fact, we didn't even consider another option. That's my baby , period. And I will go on leave (Informant 7, 2-year-old son; Trans. by A. B., N. B., & A. N.) You can't give it to anyone . Even if I left him for half an hour at first, I ran home faster. You can't trust anyone with him (Informant 14, 2-year-old son; Trans. by A. B., N. B., & A. N.)
	Special bond between mother and child	Anyway, mom has some kind of connection with the child . She understands the child more, she knows them better. And the child is still somehow closer to his mother. Well, it's impossible that, it seems to me, the dad went on maternity leave (Informant 11, 1-year-old daughter; Trans. by A. B., N. B., & A. N.) In my opinion, the mother is closer to the child anyway. The child is more attracted to the mother and for him the mother ... even a son, even a daughter, for him the mother is the first person (Informant 25, 13- and 2-year-old daughters, 1-year-old son; Trans. by A. B., N. B., & A. N.) Mom is still the most important person for a child (Informant 27, 9-month-old son; Trans. by A. B., N. B., & A. N.)

Discussion

A significant part of the informants noted that parental leave is a period requiring significant parental expenses. At the same time, the mothers pointed out that in the future they would treat this period favorably. To the greatest extent, informants focus their attention on the memories about the child. Based on this, we can make a number of assumptions about the reasons for such an ambivalent perception of parental leave by mothers. Firstly, for women, children are an important area of their self-realization in life, and thus, all the problems and difficulties that arise do not acquire any negative character in their eyes, like the positivity of the child's development and maturation process. In other words, the negative emotions associated with the complexity of work during this period are overlaid by positive feelings towards the growing child. Secondly, mothers try to displace and replace their negative experience of being on parental leave by hyperbolizing the positive aspects in this period. Thirdly, they are already on parental leave and begin to model the image of a successful mother in order to meet the social expectations of society in relation to women.

Parents themselves not only consider the care and upbringing of children among their responsibilities, but also identify this activity as a special type of labor, parental labor. The researchers note that in conditions when parental labor during parental leave takes on a negative connotation, it is possible to weaken the motives for the birth of subsequent children (Ilyshev & Bagirova, 2010). This circumstance actualizes the need to provide a favorable environment for the implementation of parental labor both in general and through the transformation of the parental leave system.

For women who are satisfied with their work, it is less difficult to carry out professional activities than parental labor. For this category of women, the question arises about the expediency of parental leave, since it will be easier for them to regain their strength by continuing their professional activities, rather than realizing parental labor. However, the attitude of career-oriented mothers towards the role of parental leave is not uniform. Our results allowed us to identify three different positions of this category of women on the importance of parental leave.

The first one assumes that the family may not use the provided leave at all, the mother can continue to work by hiring a babysitter. In many ways, these mothers, not wanting to do household chores, are more motivated to return to work (Kuhlenkasper & Kauermann, 2010), as they are more interested in the desire to achieve recognition and a higher position in their profession (Strunina, 2022).

The second position does not exempt a woman from the need to combine work and motherhood, even with the involvement of babysitters and relatives. For this group of women, it is important to satisfy their needs for professional self-realization and at the same time leave the dominant role in the upbringing and care of children to themselves, despite the help of other actors of parental labor. By staying on parental leave, having helpers, and at the same time working, these women get away from the potential double burden of combining the roles of a mother and employee, making a forced, but more rational choice in favor of the child.

The third position is based on the importance of the period of parental leave. This category of women, despite their professional ambitions, is unable to step over their role as a mother, which is more important to them though being more intense than the work.

The results we obtained show that during the parental leave period, mothers are the main actors performing household and parental functions. At the same time, mothers try to limit the participation of fathers in parental leave for a number of subjective reasons, such as a possessive attitude towards the child and distrust of the quality of parental functions performed by fathers. However, Lamb and Lewis (2010) did not identify significant differences between the abilities of mothers and fathers to ensure safety and respond to the needs of the child. Since the mother may lose her dominant role in the domestic sphere, she is interested in presenting the situation in such a way that the father is supposedly not as well suited to take care of the child as she is, in order to maintain her status (Rege & Solli, 2013). Olsavsky et al. (2020) emphasize that a more active participation of fathers in the childrearing is possible if mothers are willing to weaken their leading role in the domestic sphere. Some mothers approved of their partner's involvement; however, this caused them emotional distress due to feelings of guilt for lessening their responsibility and delegating their tasks to the father (Kaufman & Almqvist, 2017). Consequently, one of the reasons Russian mothers carry out most of the workload is that they concentrate parental functions in their hands and limit the participation of fathers fearing possible excessive involvement of men in the domestic sphere, which, in turn, will reduce the dominant influence of the mothers themselves. Thus, for many women, the opportunity for self-realization in the family sphere of life will probably be lost, which will force them to seek their application in other spheres of public life, in which they may not be

interested. Consequently, in many ways, women themselves are responsible for the fact that the traditional division of roles is preserved and reproduced in the domestic sphere, when men are assigned the function of a protector and breadwinner, and women are assigned the duties of a housewife.

In this case, the father's use of parental leave contradicts established gender roles. This behavior is likely to be negatively perceived by both women and men. The negative perception of the father's use of parental leave is not due to the direct condemnation from society, but due to fears about the possible convergence of the roles of men and women, which will force them to engage in similar activities and be in tougher competition between representatives of different genders. In addition, the maintenance of familiar roles is facilitated by the fact that, as a rule, men's incomes exceed women's one. Consequently, the time spent by fathers on parental leave is more expensive for the household than by mothers (Becker, 1993). Additionally, after asking questions to two families in which the father is on parental leave (they refused to participate in a full-length interview), we found out that cases of fathers using parental leave have nothing to do with the fact that their incomes are lower than women's ones, but are related to the fact that mothers worked informally before the childbirth, and their form of employment provided an opportunity to continue their professional activities and maintain income, while fathers had the opportunity to continue their career formally part-time, but in fact completely devoting themselves to work. That is, one of the main reasons for fathers not using parental leave is the desire of Russian society, both its male and female parts, to preserve the traditional division of roles in the family.

Conclusion

The results obtained indicate that Russian parents interviewed do not view parental leave as a vacation; rather, it is a period of intensive work associated with the permanent exercise of responsibilities for the care and upbringing of a child. At the same time, they are convinced that in the future, memories of the time spent on parental leave will be positively colored, since leave is associated with the active development of the child and the mothers receiving a unique experience.

During the leave, there is a break from professional activities, which, however, is perceived as forced in one model of modern motherhood. Under this model, the workload during parental leave is considered so significant that the preferred strategy is a quicker return to professional activity rather than continuing to care for the child.

According to the informants, the child's mother should be on parental leave "by default." This attitude is due to traditional family values, where the mother plays the dominant role in the upbringing of children, and fathers, as a rule, are given a secondary role in the process of raising children. We have identified objective and subjective reasons for fathers not using the right to parental leave. Objective reasons are associated with a higher income level for men; the lack of opportunities for men to provide breastfeeding; the need for a woman to recover after childbirth. The subjective reasons included attitudes originating from previous generations; gender stereotypes

that are not subject to discussion in families; distrust of mothers towards fathers; maternal sense of ownership; a special bond between mother and child.

Although the results obtained indicate a social orientation towards the preservation of the existing parental leave system in Russia and the traditional division of gender roles, they allow us to identify a number of contradictions inherent in this system.

Firstly, parental leave is perceived as a difficult period characterized by high labor intensity, routine, and the constant nature of this work, the absence of a change between work and rest regimes, and a high burden on mothers. At the same time, mothers realize that in the future, when recalling this period, it will be positively colored. Creating opportunities to reduce the burden of parental leave by ensuring the availability of childcare services will overcome this contradiction, reducing the negativity of the leave perception and at the very moment of mothers' being on leave.

Secondly, two models of women's perception of parental leave coexist in Russian society today. The maternity leave model, in which the implementation of parental functions on parental leave is identified with more difficult and energy-consuming activities compared to employment in the labor market, competes with another model, which is shared by informants for whom staying on maternity leave provides an opportunity to take a break from professional employment. To reduce the workload of mothers experiencing difficulties on parental leave, it is advisable to start public discussions and develop measures aimed at reducing the working hours of fathers.

Thirdly, a barrier to combining two types of self-realization for women, in family and professional activities, is a lack of necessary conditions for entering the workplace without prejudice to the development of the child. Despite having the right to work part-time, many women are unaware of this or face the fact that the employer allows them to go to work only full-time.

Fourthly, the failure of fathers to use the right to parental leave due to economic considerations (fathers' incomes are higher; thus, the family loses more income when using father's leave) leads to even greater specialization of roles, reproduces and exacerbates the situation of the income gap between men and women. As a result, an effective tool aimed at smoothing income differences between men and women may be to strengthen women's participation in socio-economic activities by creating conditions for the direct involvement of fathers in the exercise of parental responsibilities through the introduction of paternal quotas or increased benefits for fathers.

Fifthly, women believe that they are better at coping with parental responsibilities than men, whereas similar studies indicate that there are no significant differences between representatives of different genders. Paternal schools teaching them parental competencies will help reduce the prejudice of mothers that fathers have fewer parenting skills.

The contradictions identified in the study can be considered as certain risks of the established parental leave system in our country. Their intensification will worsen the situation of many families on parental leave. Reducing these risks can be possible through the inclusion of various tools for the soft transformation of the parental leave system, which may involve measures aimed at alleviating the complexity of work during

the vacation period; developing a range of possibilities for combining professional and parental work and widely promoting their advantages; developing a range of financial proposals for families in which a man enjoys the right to parental leave; overcoming female stereotypes regarding the representation of fathers as parents who “do not know how” to cope with their children.

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ARTICLE IN THE SPECIAL SECTION

Regional Differences in Life Expectancy in Russia Through the Lens of Epidemiological Transition

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ABSTRACT

An immense territory of Russia with several climatic zones and, accordingly, a fundamentally different styles of life, inevitably results in pronounced varieties in the levels and structure of mortality across the regions of the country. Since the scale and sustainability of differences in mortality in Russia can be considered an entire epidemiological epoch, the evaluation of them through the lens of epidemiological transition seems methodologically appropriate. Regional differences are regarded as a kind of projection of evolution in time, though taking into account modern realities. The analysis of regional differences in mortality is based on such indicators as life expectancy, structure of mortality, i.e., predominantly endogenous to exogenous causes of death ratio, as well as the average age of death from predominantly endogenous causes calculated on the basis of life tables by cause of death. The study showed that according to the periodization of

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epidemiological transition only Moscow and St. Petersburg are at the final phase of the 3rd stage and are moving to the 4th stage of epidemiological development. Meanwhile, the burden of exogenous and preventable pathologies precludes the completion of the 3rd stage in the regions with high life expectancy according to Russian criteria. The stadal nature of epidemiologic development of Russian regions is currently conditioned by socio-economic and medical determinants, with more pressing medical determinants in regions with high and medium levels of life expectancy and socio-economic factors prevailing in regions with low life expectancy.

KEYWORDS

epidemiological transition, stages of transition, mortality patterns, age, nosology, cause of death, preventable mortality

Introduction

Among the most discussed topics in the Russian demographic literature is the regional variation of mortality in Russia. An equally relevant is the search for determinants that explain this variation and contribute to the development of effective policies for its overcoming. Evidently, reducing losses from premature mortality will decrease the scale of depopulation and loss of labor potential, along with cutting socio-demographic costs caused by the breakup of marriages as a result of widowhood and an increase in the number of single-parent families, etc.

However, the policies being developed have no reliable scientific substantiation. A significant number of explanatory hypotheses are based on socio-economic, climatic, and geographical factors, availability and quality of medical care, alcoholization, etc., thus indicating that the situation is assessed rather by external manifestations. Consequently, this situation needs to be analyzed within the framework of theoretical approaches to the evolution of mortality and its explanatory determinants, namely the concept of epidemiological transition proposed by Abdel Omran (1971).

This article aims to define the stages of epidemiologic development of Russian regions as well as to identify its main problems in the context of preventable mortality.

Theoretical Framework

The scale and sustainability of differences in life expectancy in Russia (more than 15 years for men and ten years for women in 2022), which constitute two stable vectors, the European, that is, favorable South—unfavorable North, and trans-Russian, favorable West—unfavorable East, represent an entire epidemiological epoch. Therefore, the analysis of these differences through the prism of epidemiological transition seems methodologically appropriate, with regional differences considered a projection of evolution in time, though taking into account modern realities.

Omran (1971) has originally identified three stages of the epidemiological transition. They are the age of plague and famine (when mortality remained very high for thousands of years), the age of declining pandemics, and the age of degenerative and man-made diseases.

Some researchers believe that other living conditions associated with an appropriative economy (“hunter-gatherer economy”) existed prior to the age of plague and famine. The mobility of our Paleolithic ancestors, small populations, and low densities would not have allowed infectious diseases to acquire the scale of a mass epidemic (Harper & Armelagos, 2010). The conditions favorable for the spread of infectious diseases appeared after the Neolithic Revolution characterized by the transition to a productive economy, when groups of people began to live in settled communities based on agriculture and domestication of animals. Moreover, the Neolithic Revolution was marked by social stratification, producing a significant difference in disease risk within a community (Armelagos & Harper, 2005). Therefore, the first epidemic transition, which took place about 10,000 years ago, could be associated with the Neolithic Revolution (Barrett et al., 1998).

Accordingly, the second epidemiological transition included the transition from infectious diseases to mortality from chronic diseases (Omran’s first epidemiological transition). This was a period when better nutrition and improved living standards, public health measures, and possibly new health practices resulted in a significant reduction in infectious diseases and mortality.

The modern stage of epidemiologic development (the period of degenerative and occupational diseases) began with the discovery and extensive use of antibiotics. Due to this, mortality was first associated with the modern triad of circulatory diseases, neoplasms, injuries and poisonings.

We are believed to be experiencing the third epidemiological transition, where the re-emergence of familiar infections (now resistant to antibiotics) is accompanied by the emergence of a number of new diseases with a high risk of rapid spread due to globalization (Mercer, 2018).

The studies by Olshansky and Ault (1986), as well as by Rogers and Hackenberg (1987) proposed the fourth stage, based primarily on the experience of the United States, where mortality trends in the last third of the 20th century clearly indicated a new stage associated with the postponement of degenerative and occupational diseases. The same diseases that defined the third stage remain relevant, but death occurs at much older ages. Mortality is already very low at young ages, declines rapidly in old age, and mass deaths are postponed until old age. This fourth stage, referred to by Rogers and Hackenberg as the hybrid stage, is increasingly being affected by individual behavior and lifestyle.

At the end of the last millennium, Omran (1998) noted profound epidemiological changes, albeit occurring at different rates and times in different populations. This prompted him to move from a three-step/three-model to a five-step/five-model formulation of the epidemiologic transition theory (Omran, 1998). In this new version, Omran emphasized that the epidemiological transition, driven by economic and social development, included changes in fertility and age structure of the population

leading to population ageing (part of the demographic transition), lifestyle changes (lifestyle transition), changing health care models (health transition), medical and technological evolution (technological transition), and environmental and ecological changes (ecological transition). He rejected the leading role of infections in the change of epidemiologic stages and emphasized the greater impact of social factors, lifestyle, personal hygiene, nutritional quality, and environmental factors. For the next transition, Omran outlined the following prerequisites: control of risk factors, high quality of life, equity, development, and social justice for all. Although outbreaks of new pathogens are among the least predictable threats to public health and global security (Drake et al., 2019), modern advances in medical technology are mitigating the role of infections in mortality patterns.

Omran (1998) also noted the possibility of reversal trends in the epidemiological transition, citing the example of the USSR collapse. The reverse epidemiological transition in Russia, where stressful economic problems halted the progress in healthcare thus putting back to agenda extremely high mortality in young ages from causes, which are typical for previous epidemiological stages, was convincingly shown in research by Semyonova (2005).

For developing countries, Omran identified fundamental differences caused by poverty, limited education, low status of women, and slow development. However, new discoveries in health care as well as technological development cause a layering of stages of epidemiologic transition in these societies (Omran, 1983). The result is at least three major overlapping problems: unresolved health problems, the emergence of new health problems, and unprepared health systems.

During the transition periods, systematic differences in the nature, pace, determinants, and consequences of changes in health, survival, and population size define several models of epidemiologic transition. Omran identified five models of transition for different societies: the Western, or classical, model; a semi-Western accelerated model for Eastern Europe, the former Soviet Union, and Japan; and three non-Western transition models for Third World countries including a rapid transition model for rapidly industrializing or socially developing countries and territories, an intermediate transition model for middle- and lower-middle-income countries, and a slow transition model characteristic of the least developed countries in Africa, Asia, and Latin America (Omran & Roudi, 1993). The latter model is now less prevalent due to the increasing incidence of non-communicable diseases in sub-Saharan Africa, accounting for 96% of all malaria deaths worldwide. Along with this, the double burden of noncommunicable and communicable diseases is detrimental to the health systems of these countries (Li et al., 2022).

Omran argues that in some multiracial or multicultural societies, more than one model coexists since different population groups may have diverse levels of health and medical care, as well as varying rates of transition within the same country. Differences may be due to geographic divisions (rural and urban areas, mountains and valleys), ethnic clusters, religious minorities, low-resourced areas, and isolated or neglected regions with limited access to education, development, or health services. Although

the transition period leads to changes in all social classes, it tends to begin earlier and proceed faster among the wealthier rather than the poor and disadvantaged segments of the same society.

Thus, the theory of epidemiologic transition implies the simultaneous coexistence of different models of mortality (of age and nosology), developed under the influence of epidemiologic, economic, social, environmental, and health factors.

As a logical parallel to Omran's conceptual study, there appears a study by Rutstein et al. (1976), which is aimed at assessing the effectiveness of health care and, at first glance, of a purely practical nature. This approach was later developed in the form of the concept of preventable mortality. Due to this, mortality is considered preventable if the death causes can be eliminated using the modern knowledge and practices of the health care system. Westerling et al. (1996) revealed the level of preventable mortality to be higher in regions with insufficient socio-economic development, among people with low social status and educational level. At that, the contribution of preventable mortality to the overall mortality of the population in developed countries is 10%–30%, and in countries with weak economies, this figure is 40%–50% (Westerling, 2001).

The list of causes of preventable mortality has undergone enormous changes. Nevertheless, they are based on pathologies that medicine has learned to combat both by preventive (a number of diseases of the circulatory system) and clinical (including neoplasms) methods, as well as by complex efforts of social institutions (mainly external causes such as injuries and poisonings). Whereas in Russia the latter approach is still relevant, the European countries no longer consider external causes among those of preventable mortality (Sabgayda, 2017).

Thus, Omran's theoretical studies and Rudstein's practical research have shown how mortality patterns change (or stagnate): the socio-economic breakthrough of the late 18th and early 19th centuries in the most developed European countries contributed to the formation of a middle class, significantly increasing access (primarily material) to all the modern achievements of the time for more segments of society, including decent housing, adequate nutrition, sanitation and hygiene skills, access to medical care and education. This very situation created the conditions for the decline in mortality in the early and mid-19th century, long before the bacteriological revolution.

The consistency of the determinants of epidemiologic transition and preventable mortality ensures the combined use of these conceptual approaches to analyze regional differences in mortality in Russia. Therefore, the stadial nature of epidemiologic development in the vast geographical area of Russia can be determined, along with diseases and factors providing the success or failure of epidemiologic development in Russian regions.

Materials and Methods

Cardiovascular and oncologic diseases seem to be among the inevitable losses. In this approach, the principle is the late age of death, when dystrophic changes in the body

are physiologically conditioned. Presently, the fact that deaths from cardiovascular diseases at working ages are mainly caused by behavioral risk factors and, therefore, are exogenous has become axiomatic. However, advances in clinical medicine and earlier detection of oncology can minimize mortality from neoplasms during the same period of life activity.

Meanwhile, infectious diseases, digestive diseases, and external causes should be considered preventable. Moreover, with regard to the developed system of prevention and adequate drug treatment, infectious diseases should be considered preventable regardless of age. Respiratory diseases are scarcely preventable only in old age. As for diseases of the digestive system in Russia, they often have an alcoholic etiology, hence also being assessed as exogenous. Injuries and poisonings are considered to be exogenous by convention, which is why all classifications refer them to causes preventable by a set of preventive measures.

Our study also included causes of death categorized as “Symptoms, signs, and abnormal clinical and laboratory findings, not elsewhere classified” (R00–R99) according to the International Classification of Diseases and Related Health Problems 10th Revision (ICD-10)¹. They not only account for a significant share in the structure of causes of death in most regions of the country, but also, depending on the average age of death, disguise either diseases of the circulatory system or external causes (Ivanova et al., 2013).

Hence, life expectancy levels (LE), mortality structure, i.e., the ratio of predominantly endogenous and exogenous causes of death, and the average age of death from predominantly endogenous causes are used to assess the epidemiological development in the Russian territories.

We used life table data by cause of death as such indicators, namely the probability of death from individual causes, expressed as the share of deaths (SD) from a particular cause and the average age of death (AAD) from these causes. These will enable comparison between regions, regardless of their age structure.

The calculations were performed on the basis of data provided by Rosstat² [Federal State Statistics Service] upon request. Forms *Raspredelenie po polu, vozrastu i prichinam smerti* [Distribution by gender, age, and causes of death] and *Srednegodovaia chislennost' naseleniia po polu i vozrastu* [Average annual population by gender and age] for 2019 were used.

Results

For each indicator, the Russian regions have been independently grouped based on the standard deviation of groups with low, middle, and high levels. Based on the distributions obtained, a classification was developed based on male and female life expectancy. Within these classes, representation of regions with various combinations of SD from endogenous and exogenous causes and AAD from

¹ <https://icd.who.int/browse10/2019/en#XVIII>

² <https://rosstat.gov.ru/folder/12781>

endogenous causes³ has been considered. Table 1 outlines the selected groups and their limits. The analysis was carried out according to the 2019 indicators to avoid fluctuations caused by the COVID-19 pandemic.

Table 1

Group Limits of the Russian Regions According to the Life Expectancy, Share of Deaths From Endogenous Causes, and Average Age of Death

	Life expectancy	Diseases of the circulatory system		Neoplasms	
		Share of deaths	Average age of death	Share of deaths	Average age of death
Males					
High	> 68.3	> 48,400	> 71.6	> 18,300	> 68.9
Medium	65.5–68.2	42,501–48,399	69.6–71.5	15,801–18,299	67.4–68.8
Low	< 65.6	< 42,500	< 69.5	< 15,800	< 67.3
Females					
High	> 78.3	> 56,300	> 79.7	> 15,000	> 70.8
Medium	76.4–78.2	47,501–56,299	78.5–79.6	12,301–14,999	69.2–70.7
Low	< 76.5	< 47,500	< 78.4	< 12,300	< 69.1

The area of well-being, where LE exceeded 68.3 years in males and 78.3 years in females, in 2019 included 22 and 25 regions, respectively.

For males, the most common regions included the ones with high SD and AAD from diseases of the circulatory system: a similar situation was registered in seven out of 22 regions, i.e., 31.8% of the area (Moscow, St. Petersburg, Sevastopol, North Ossetia–Alania, Stavropol Krai, Volgograd and Saratov Oblasts). A combination of high SD and medium AAD is presented with almost the same frequency (six regions out of 22). Mordovia is the only territory of the area of well-being with registered low SD from diseases of the circulatory system and low AAD (Table 2).

Table 2

Typology of the Russian Regions With High Life Expectancy According to Share of Deaths From Diseases of the Circulatory System and Average Age of Death (2019)

SD/AAD	High	Medium	Low
Males			
High	Moscow, St. Petersburg, Sevastopol, North Ossetia–Alania, Stavropol Krai, Volgograd Oblast, Saratov Oblast	Dagestan, Kabardino-Balkaria, Tatarstan, Khanty-Mansi Autonomous Okrug, Adygea	Krasnodar Krai, Moscow Oblast, Leningrad Oblast

³ A group with a high share of deaths from external causes includes regions where the required indicators exceed 5.6% and 2.7% for diseases of the respiratory system in males and females, respectively, 6.2% and 5.6% for diseases of the digestive system, and 2.1% and 1.1% for infectious diseases, 12.5% and 4.1% for external causes and 6.9% and 14.4% for symptoms, signs, and ill-defined conditions in males and females, respectively. A group with a low share of deaths from external causes included regions where the required indicators were lower than 3.7% and 1.4% for diseases of the respiratory system in males and females, respectively, 4.9% and 4.1% for diseases of the digestive system, and 0.75% and 0.4% for infectious diseases, 9% and 2.6% for external causes, and 3.7% and 6.5% for symptoms, signs, and ill-defined conditions in males and females, respectively.

Table 2 Continued

SD/AAD	High	Medium	Low
Medium	Belgorod Oblast	Kalmykia, Rostov Oblast, Kaliningrad Oblast	Karachay-Cherkessia
Low			Mordovia
Females			
High	Moscow, St. Petersburg, Sevastopol, North Ossetia–Alania, Volgograd Oblast, Penza Oblast	Dagestan, Tatarstan, Khanty-Mansi Autonomous Okrug, Yamalo-Nenets Autonomous Okrug	Mari El, Leningrad Oblast
Medium	Stavropol Krai	Adygea	Kalmykia, Kabardino-Balkaria, Chuvash Republic, Krasnodar Krai, Moscow Oblast
Low		Belgorod Oblast	Karachay-Cherkessia, Mordovia, Voronezh Oblast, Ryazan Oblast, Tambov Oblast

As with cardiovascular diseases, in case of neoplasms, a low AAD is the rarest in the area of well-being (three regions out of 22), almost 60% of the area have high AAD, while the most common are regions with high SD and high AAD (six or 27.3% of regions) such as Moscow, St. Petersburg, Sevastopol, Yamalo-Nenets Autonomous (AO), Leningrad and Kaliningrad Oblasts (Table 3).

Table 3

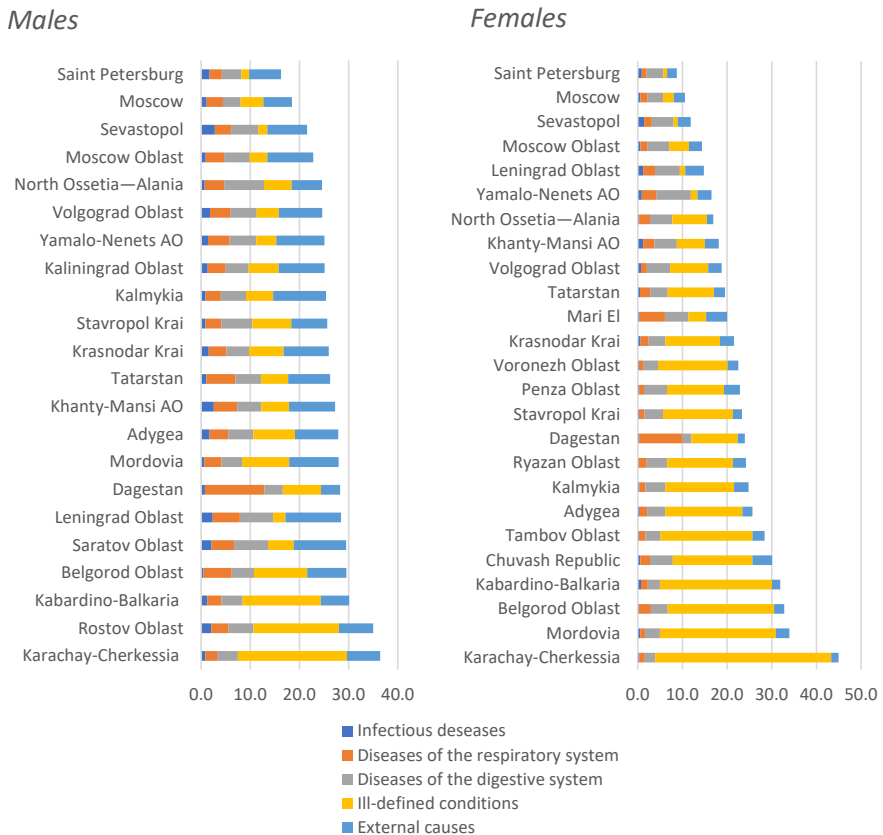
Classification of the Russian Regions With High Life Expectancy According to Share of Deaths From Neoplasms and Average Age of Death (2019)

SD/AAD	High	Medium	Low
Males			
High	Moscow, St. Petersburg, Sevastopol, Yamalo-Nenets AO, Kaliningrad Oblast, Leningrad Oblast	Kabardino-Balkaria, Tatarstan, Khanty-Mansi AO, Volgograd Oblast	Dagestan, North Ossetia–Alania, Moscow Oblast
Medium	Kalmykia	Adygea, Saratov Oblast	Karachay-Cherkessia, Krasnodar Krai, Stavropol Krai
Low			Mordovia, Belgorod Oblast, Rostov Oblast
Females			
High	Moscow, St. Petersburg, Yamalo-Nenets AO, Sevastopol, Leningrad Oblast	North Ossetia–Alania, Kalmykia, Tatarstan, Moscow Oblast	Mari El, Khanty-Mansi AO
Medium		Adygea, Volgograd Oblast	Kabardino-Balkaria, Chuvash Republic, Ryazan Oblast, Krasnodar Krai
Low			Dagestan, Karachay-Cherkessia, Mordovia, Stavropol Krai, Belgorod Oblast, Voronezh Oblast, Penza Oblast, Tambov Oblast

A characteristic feature of the area of well-being is a fairly low burden of exogenous causes. For example, high SD from preventable diseases is registered in no more than 18% of the area (Figure 1).

Symptoms, signs, and ill-defined conditions are the exception to the rule, their low SD in the area of well-being seems rather an exception, registered in only four regions (St. Petersburg, Sevastopol, Moscow Oblast, and Leningrad Oblast), while more than 40% of the area have high SD from these vague causes. However, high SD from ill-defined conditions is registered in the regions with high AAD, which may indicate that mortality from cardiovascular diseases in this class is disguised.

Figure 1
Share of Deaths From Causes Preventable by Modern Medicine and Healthcare in the Russian Regions With High Life Expectancy, % (2019)



In females, like in males, the most typical of the area of well-being is high AAD from diseases of the circulatory system, registered in almost half of the regions within the area (12 out of 25). However, in females, low AAD is much more common than in males (six of the 25 regions within the area of well-being, or 24%), though in this case

it is usually accompanied by low SD from cardiovascular diseases (five regions) as shown in Table 2.

A reference combination (high SD–high AAD) is registered in six regions, or 24% of the area of well-being (Moscow, St. Petersburg, Sevastopol, North Ossetia–Alania, Penza Oblast, Volgograd Oblast).

As for neoplasms, high AAD is also the most typical of females died from cancer in the area of well-being (11 regions, or 44% of the area), while, unlike men, a combination of low SD and low AAD, registered in eight regions (32% of the area) seems to be the most typical. The required combination of high SD and high AAD was registered only in 20% of the area of well-being including Moscow, St. Petersburg, Sevastopol, Yamalo-Nenets Autonomous Okrug, Leningrad Oblast (Table 3).

As well as males, females in the area of well-being have a slight burden of exogenous causes: the maximum SD does not exceed 15% if ill-defined conditions are excluded (Figure 1).

As for ill-defined conditions, like in males in the area of well-being, these causes are also widespread in females, while high SD is registered in 44% of the area. However, none of these regions showed low AAD, typical of residents of Moscow, St. Petersburg, Sevastopol, Leningrad Oblast, and Yamalo-Nenets Autonomous Okrug, where SD from ill-defined conditions is minimal. In fact, in regions with high SD from ill-defined conditions, these causes disguise mortality from chronic noncommunicable diseases in both males and females, and most often diseases of the circulatory system. This is evidenced by high AAD from ill-defined conditions in these regions, whereas in the regions with lowest SD and low AAD ill-defined conditions are most likely to disguise injury and poisoning (Ivanova et al., 2013).

Next, let us consider the opposite group of the regions with the lowest life expectancy (65.6 years and below in males and 76.4 years and below in females), which included 22 and 24 regions, respectively.

In this area of distress, the most common is medium SD from diseases of the circulatory system rather than high SD, registered in males and females (nine and 11 regions, 40.9% and 45.8% of the area, respectively) as shown in Table 4. As expected, regions with low AAD prevailed (12 and 15 regions, respectively, or 54.5% and 62.5% of the area). It should be noted that there was not a single region in the area of distress with high AAD in males, high AAD in females was registered in two regions only.

Table 4

Classification of the Russian Regions With Low Life Expectancy According to Share of Deaths From Diseases of the Circulatory System and Average Age of Death (2019)

SD/AAD	High	Medium	Low
<i>Males</i>			
Medium	Kamchatka Krai, Perm Oblast, Pskov Oblast, Chukotka AO	Komi Republic, Khakassia, Kemerovo Oblast, Magadan Oblast	Buryatia, Tuva
Low	Jewish AO	Karelia, Primorsky Krai, Khabarovsk Krai, Novgorod Oblast, Irkutsk Oblast	Altai Republic, Zabaykalsky Krai, Altai Krai, Amur Oblast, Kurgan Oblast, Sakhalin Oblast

Table 4 Continued

SD/AAD	High	Medium	Low
Females			
High	Krasnoyarsk Krai, Murmansk Oblast		
Medium	Khakassia, Pskov Oblast, Magadan Oblast	Buryatia, Tver Oblast, Kemerovo Oblast	Sakhalin Oblast
Low	Kamchatka Krai, Jewish AO, Chukotka AO, Irkutsk Oblast	Altai Republic, Tuva, Komi Republic, Karelia, Primorsky Krai, Zabaykalsky Krai, Khabarovsk Krai, Novgorod Oblast	Altai Krai, Amur Oblast, Ivanovo Oblast

As for neoplasms, for men, half of the area consisted of regions with medium SD, a low indicator was registered in 31.8% of the area (Table 5). For females, regions with high and medium SD were distributed almost equally (12 and 11 regions, respectively); low SD was registered in one region only. The medium level of AAD from neoplasms is typical of the area of distress, registered in 13 regions (59.1% of the area in males and 54.2% in females), while AAD was low in seven and nine regions (31.8% and 37.5%, respectively), and high AAD from neoplasms was registered in only two regions in both males and females.

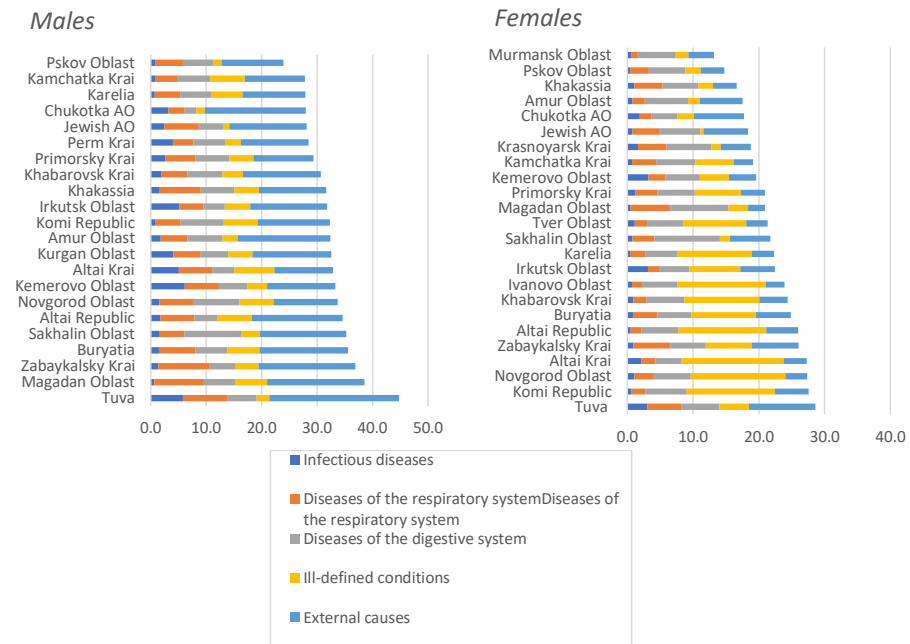
Table 5

Classification of the Russian Regions With Low Life Expectancy According to Share of Deaths From Neoplasms and Average Age of Death (2019)

SD/AAD	High	Medium	Low
Males			
High	Sakhalin Oblast	Magadan Oblast	
Medium	Altai Republic, Khakassia, Primorsky Krai	Buryatia, Karelia, Komi Republic, Kurgan Oblast, Kemerovo Oblast, Irkutsk Oblast, Jewish AO	Tuva, Perm Krai, Khabarovsk Krai
Low		Altai Krai, Pskov Oblast, Amur Oblast	Zabaykalsky Krai, Kamchatka Krai, Chukotka AO, Novgorod Oblast
Females			
High	Khakassia, Krasnoyarsk Krai		
Medium	Karelia, Komi Republic, Primorsky Krai, Murmansk Oblast, Irkutsk Oblast, Kemerovo Oblast, Sakhalin Krai, Chukotka AO	Tuva, Kamchatka Krai, Khabarovsk Krai, Tver Oblast, Jewish AO	
Low	Buryatia, Magadan Oblast	Altai Republic, Altai Krai, Zabaykalsky Krai, Amur Oblast, Ivanovo Oblast, Pskov Oblast	Novgorod Oblast

A characteristic feature of the area of distress is a wide prevalence of preventable conditions: for example, high SD from infectious diseases in males was registered in nine regions, and in ten regions in females (40.9% and 41.7% of the area, respectively), high SD from diseases of the respiratory system in males was registered in ten regions and in 12 regions in females (45.5% and 50% of the area, respectively) as shown in Figure 2. It is quite unexpected that diseases of the digestive system in the area of distress are rather a female problem: high SD from these diseases was registered in 13 regions or 54.2% of the area, and only in five regions in males (22.7%). Certainly, high SD from external causes is typical of the area of distress, registered in 13 regions (59.1% and 54.2% of the area, respectively). Against this background, it should be noted that high SD from ill-defined conditions in the area of distress is an extremely rare exception, registered in only two regions, while low AAD is typical, especially in males.

Figure 1
Share of Deaths From Causes Preventable by Modern Medicine and Healthcare in the Russian Regions With Low Life Expectancy, % (2019)



The middle area, formed by regions with male life expectancy ranging from 65.6 to 68.2 years, and female life expectancy from 76.5 to 78.3 years, consisted of 38 and 33 regions, respectively.

As expected, the most typical of the middle area were medium levels of SD from diseases of the circulatory system (42.1% of the area in males and 48.5% in females) against the background of medium levels of AAD, registered in two-thirds of the area in males and females (Table 6). High SD from cardiovascular diseases was observed in

about a quarter of the regions in the area (26.3% and 24.2%, respectively), high AAD in 13.2% and 18.2%, respectively. At the same time, a combination of these indicators (high SD–high AAD) was registered in only three regions in both males and females.

Table 6

Classification of the Russian Regions With Medium Levels of Life Expectancy According to Share of Deaths From Diseases of the Circulatory System and Average Age of Death (2019)

SD/AAD	High	Medium	Low
Males			
High	Crimea, Penza Oblast, Ulyanovsk Oblast	Sakha (Yakutia), Oryol Oblast, Kostroma Oblast, Nizhny Novgorod Oblast, Arkhangelsk Oblast, Murmansk Oblast	Vologda Oblast
Medium		Udmurt Republic Krasnoyarsk Krai, Astrakhan Oblast, Bryansk Oblast, Vladimir Oblast, Kaluga Oblast, Kirov Oblast, Novosibirsk Oblast, Orenburg Oblast, Sverdlovsk Oblast, Tyumen Oblast (without AO), Chelyabinsk Oblast	Voronezh Oblast, Kursk Oblast, Smolensk Oblast, Tver Oblast
Low	Tomsk Oblast, Samara Oblast	Bashkortostan, Mari El, Chuvash Republic, Lipetsk Oblast, Ryazan Oblast, Tula Oblast, Omsk Oblast	Ivanovo Oblast, Tambov Oblast, Yaroslavl Oblast
Females			
High	Crimea, Arkhangelsk Oblast, Vladimir Oblast	Kirov Oblast, Tomsk Oblast	Tula Oblast
Medium	Sakha (Yakutia), Nizhny Novgorod Oblast, Oryol Oblast, Saratov Oblast, Ulyanovsk Oblast	Astrakhan Oblast, Bryansk Oblast, Vologda Oblast, Kaluga Oblast, Kursk Oblast, Kaliningrad Oblast, Kostroma Oblast, Novosibirsk Oblast, Orenburg Oblast, Perm Krai, Sverdlovsk Oblast, Tyumen Oblast (without AO) Chelyabinsk Oblast	Bashkortostan Udmurt Republic, Samara Oblast, Omsk Oblast
Low		Smolensk Oblast	Lipetsk Oblast, Rostov Oblast, Yaroslavl Oblast, Kurgan Oblast

The situation with cancer mortality in the middle area hardly differ from deaths from diseases of the circulatory system (Table 7). It is quite natural that medium values of SD from cancer were the most common, registered in 42.1% of the regions in males and 51.5% in women, while medium levels of AAD were the most typical (60.5% and 45.5%, respectively). Interestingly, the middle area was characterized by a proportional distribution of the regions with high and low SD from neoplasms (28.9% in males and 24.2% in females), while the indicator of AAD showed a similar proportionality between high and low values in females only (27.3% of the regions), For males, regions with low AAD were twice as prevalent (ten vs. five regions with high AAD from neoplasms) resulting in more potential years of life lost with an equal risk of

death. A combination of high SD–high AAD was registered in four and six regions in males and females, respectively.

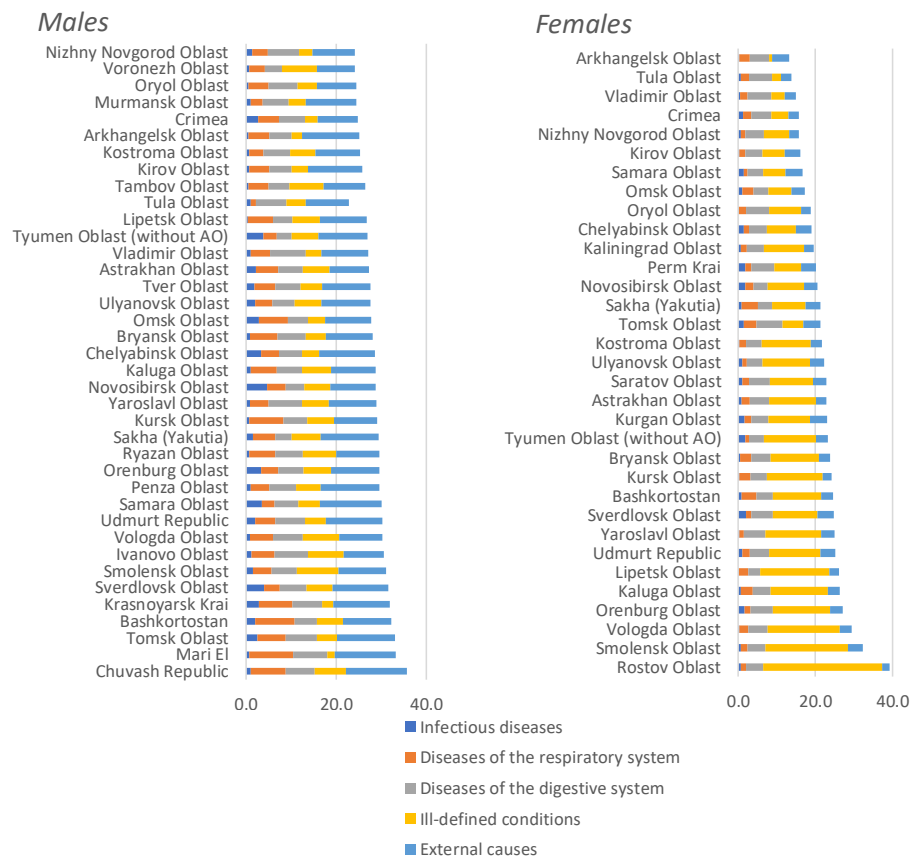
Table 7

Classification of the Russian Regions With Medium Levels of Life Expectancy According to Share of Deaths From Neoplasms and Average Age of Death (2019)

SD/AAD	High	Medium	Low
Males			
High	Krasnoyarsk Krai, Tomsk Oblast, Sverdlovsk Oblast, Chelyabinsk Oblast	Sakha (Yakutia)	
Medium	Arkhangelsk Oblast, Bryansk Oblast, Novosibirsk Oblast, Oryol Oblast, Ulyanovsk Oblast, Kostroma Oblast, Orenburg Oblast	Bashkortostan, Crimea, Udmurt Republic, Astrakhan Oblast, Vladimir Oblast, Vologda Oblast, Kaluga Oblast, Kirov Oblast, Murmansk Oblast, Omsk Oblast, Tula Oblast, Tver Oblast, Yaroslavl Oblast	Mari El, Penza Oblast, Samara Oblast
Low		Ivanovo Oblast, Kursk Oblast	Chuvash Republic, Voronezh Oblast, Lipetsk Oblast, Smolensk Oblast, Nizhny Novgorod Oblast, Ryazan Oblast, Tambov Oblast, Tyumen Oblast (without AO)
Females			
High	Sakha (Yakutia), Tomsk Oblast, Arkhangelsk Oblast, Novosibirsk Oblast, Sverdlovsk Oblast, Chelyabinsk Oblast	Udmurt Republic, Tula Oblast, Astrakhan Oblast	
Medium	Kaliningrad Oblast, Kostroma Oblast	Perm Krai, Bryansk Oblast, Vologda Oblast, Omsk Oblast, Vladimir Oblast, Kaluga Oblast, Kirov Oblast, Kurgan Oblast, Oryol Oblast, Orenburg Oblast, Ulyanovsk Oblast, Yaroslavl Oblast	Bashkortostan
Low		Crimea, Kursk Oblast	Lipetsk Oblast, Nizhny Novgorod Oblast, Rostov Oblast, Samara Oblast, Saratov Oblast, Smolensk Oblast, Tyumen Oblast (without AO)

Regarding exogenous causes, it should be noted that in this area regions with medium values of SD from exogenous causes prevail; however, the ratio of regions with high and low levels of indicators is not in favor of the latter (Figure 3). Thus, high SD from infectious diseases was registered in both males and females in 12 regions vs. nine and seven regions with low indicators, high SD from external causes was registered in more than 20% of the middle area in both sexes. Interestingly, against this background, the distribution of regions with high and low SD from ill-defined conditions turned out to be proportional, equaling to seven vs. seven in males and eight vs. nine in females, while high SD against the background of low AAD from ill-defined conditions was registered only in males in two regions.

Figure 3
Share of Deaths From Causes Preventable by Modern Medicine and Healthcare in the Russian Regions With Medium Levels of Life Expectancy, % (2019)



Discussion

Before discussing the study results, let us once again recall the main approaches and tools.

According to the concept of preventable mortality, with effective health care, mortality from exogenous preventable causes should be rapidly decreasing compared to mortality from inevitable or poorly preventable causes, which, in the course of the epidemiological development, cannot but result in the increased contribution of endogenous causes against the background of the decreased total mortality. On the other hand, high AAD implies concentration of deaths from endogenous causes in old ages.

In this context, it seems important that against the background of post-industrial countries where life expectancy in both men and women is close to 80 years and over, Russia falls behind across all ages, primarily in working ages. This obviously implies a lower average age of death from endogenous causes than in post-industrial countries.

Another important aspect is that classification of the Russian regions according to the level of AAD was carried out statistically. This statement of the current situation does not always coincide with physiologically determined criteria. The most striking example is respiratory diseases: in young ages they are an exogenous pathology and, of course, preventable. Dystrophic age-related changes in the lungs result in heart weakening and deteriorated perfusion. Thus, in senile (precisely senile) ages, obstructive pulmonary diseases should be attributed to endogenous, but AAD should be 80 years and over, which is not observed in Russia, especially in males.

The third aspect that cannot be neglected is mortality from symptoms, signs, and ill-defined conditions: deaths from these blurred causes in Russia are due to two diagnoses, which are unspecified cause of mortality (R99) and age-related physical debility (R54). The age-related physical debility is widely diagnosed at the age of 80 and older, while the unspecified cause of mortality is associated with deaths from ill-defined conditions at the ages from one to 79. Previous studies have shown that in working ages, unspecified causes of death turn out to be external, with alcohol and drug poisoning, not excluding suicide and murder (Semyonova et al., 2017), in old ages, this is usually an underestimation of cardiovascular mortality (Semyonova et al., 2016).

Passing to the direct discussion of the results, it should be stressed out that the percentage of regions characterized by high share of deaths from endogenous causes against the background of high average age of death declines with a decrease in life expectancy. Thus, in the area of well-being, the share of regions with high SD from cardiovascular diseases against the background of high AAD equals to 31.8% in males and 24% in females, 7.9% and 9.1%, respectively in middle area, 0.0% in males and 8.3% in females in the area of distress. Similar patterns were noted for neoplasms: the share of regions with high SD from cancer and high AAD in the area of well-being equals to 27.3% and 20.0%, while in the middle area 10.5% and 18.2%, and 4.5% and 8.3% in the regions with low life expectancy, respectively.

To assess status of the Russian regions in the context of the epidemiological transition, let us recall that the 4th, modern, stage is characterized by concentration

of mass mortality from endogenous causes in old ages with a combination of these indicators for both causes (cardiovascular diseases and cancer) in one region.

If we consider the selected regions, it turns out that the number of regions characterized by high AAD and high SD from both cardiovascular diseases and cancer is extremely limited. These are Moscow, St. Petersburg, and Sevastopol for both males and females, as well as the Arkhangelsk Oblast and the Krasnoyarsk Krai for females.

It seems significant that in Moscow, St. Petersburg, and Sevastopol, the required combination is registered among the entire population, which is quite predictable, proceeding from high life expectancy in these regions. On the other hand, the presence of the Arkhangelsk Oblast and especially the Krasnoyarsk Krai, where the required combination is noted, first, in females only, and second, it is observed against the background of medium and even low level of life expectancy is rather surprising.

To comprehend this paradox, let us note that even among the three cities, Sevastopol is noticeably lagging behind with its life expectancy being 4.5 year lower in males and 3.1 year lower in females compared to Moscow and St. Petersburg, SD from all exogenous causes is low, Sevastopol shows high SD from infectious diseases (certainly preventable), while its SD from diseases of the digestive system is characterized by medium levels rather than low ones.

As for females in the Arkhangelsk region, the aggravating factor is high SD from the third leading cause, that is, injury and poisoning, which undoubtedly affects life expectancy.

Even more interesting is the picture of female mortality in the Krasnoyarsk Krai, where high SD from all preventable causes is registered, undoubtedly placing the region in the area of distress.

Moreover, even in Moscow and St. Petersburg against the background of favorable all major indicators an abnormally low (especially in males) AAD from ill-defined conditions is noted, suggesting an underestimation of mortality from external causes due to transfer of some deaths to a latent form.

Thus, objective data indicate that currently all regions of Russia are at the 3rd stage of the epidemiological transition, yet at different phases. This conclusion differs somewhat from the one by Shibalkov (2017) that the regions of Russia are at different stages of the epidemiological transition. Perhaps, the years 2016–2019, which were not included in his analysis, have an effect, when there was a steady decline in mortality from almost all causes in all regions of the Russian Federation, which could change the situation. Thus, it was shown that in the context of increasing life expectancy, there was a noticeable convergence of regional indicators driven by the far groups, primarily due to leveling up the lagging regions (Popova & Zorina, 2019).

In general, a shared problem of the Russian regions is a layering of half-solved problems of the previous stages of the epidemiological development (minimization of deaths from exogenous, preventable causes) and modern (endogenous causes) found even in the regions of the area of well-being. Thus, in this group, infectious diseases are extremely important in Sevastopol, the Khanty-Mansi Autonomous Okrug, Leningrad Oblast, and in males in Saratov Oblast; while diseases of the respiratory system are crucial in Dagestan, Belgorod Oblast, in males in Tatarstan and females in Mari El,

Yamalo-Nenets Autonomous Okrug, and Leningrad Oblast; diseases of the digestive system in males in the North Ossetia–Alania, Stavropol Krai, Leningrad and Saratov Oblasts and in females in Yamalo-Nenets Autonomous Okrug.

Along with decreasing life expectancy, the burden of these pathologies increases, and almost all regions in the area of distress are characterized by high risks of at least one preventable cause of death or a complex of causes.

It can be stated that the Russian regions in aggregate represent kind of a geographical development of stadial nature of the 3rd stage of the epidemiological transition.

In this context, it seems effective to address to the second part of the Omran's classical concept, namely, to the factors that determine stadial nature of the epidemiological development. Although the stages of the epidemiological transition are widely discussed, the factors are often left aside. Meanwhile, these factors help understand gaps in the epidemiological development, thus having been combined into components by Omran (environmental, medical, socio-economic).

In this regard, regions can be identified where the growth of SPM is determined by the actualization of one or another of the leading components or their complex. These components can be specific even in the context of endogenous pathologies.

As for oncology, the medical component certainly seems to be the leading one here, since in the concept of preventable mortality, early diagnosis and adequate treatment are associated with the reduced mortality from most neoplasm localities. The most obvious marker of distress is high SD with low AAD, which is observed in females in Buryatia and the Magadan Oblast.

Such a combination in the case of circulatory diseases is observed in the population of the Jewish Autonomous Okrug, in males in the Vologda Oblast and females in the Irkutsk Oblast, Kamchatka Krai, as well as Chukotka Autonomous Okrug. That indicates cardiovascular mortality in ages in which these deaths are not physiologically induced, though are rather determined by behavioral risk factors, with alcohol being the leading one. Therefore, prevention of these deaths is defined by prevention in terms of the concept of preventable mortality or a social component in terms of the concept of epidemiological transition.

The hypothesis of a significant contribution of the alcohol factor to premature cardiovascular mortality is also confirmed by other authors. In their study, Gornyi et al. (2022) identified a statistically significant relationship between regional mortality from cerebrovascular diseases and myocardial infarction and alcohol-related situation in these regions. Moreover, Russian data are consistent with the results from other countries. For instance, in the U.S., cardiovascular diseases are more likely to be the main cause of death in low-income counties, and, consequently, are associated with unhealthy behavior, whereas a shift towards cancer as the main cause of death was typical of highest-income counties (Hastings et al., 2018).

Apart from the real risk factors which can be effectively addressed to reduce preventable losses, the diagnostic accuracy and adequacy of specific causes of death should be considered. According to a study by Drapkina et al. (2021), the greatest regional variations are reported exactly for preventable causes of cardiovascular

mortality, as the coefficient of variation of the regional standardized mortality rates from cardiac causes in 2019 equaled to 25.8%, and 64.5% and 122.7% specifically from acute forms of coronary heart disease and causes associated with arterial hypertension respectively. Variations in mortality from preventable causes are manifested even in the context of the federal districts: in the mortality structure among working population, the share of coronary heart disease ranges from 38.1% to 51.9%, the share of cerebrovascular diseases ranges from 16.8% to 21.8% (Usacheva et al., 2021). For malignant neoplasms, regional variations are less pronounced than for cardiovascular diseases, in 2019, the coefficient of variation added up to 26.7%; the authors have explained it by a more accurate diagnosis of the main cause of death, taking into account the accepted standards for cancer diagnosis (Drapkina et al., 2019).

The decrease in life expectancy in the middle area and especially in the area of distress is caused by the accumulation of exogenous pathologies and external causes, which mortality reduction is due to the medical and social components. Moreover, even the mortality of children from external causes in the Russian Federation has an extremely wide variation. So, in 2018, the level of this indicator in children aged 0–14 years differed 18.7 times in various regions and 16.6 times in children aged 0–17 years (Fisenko et al., 2020). This clearly defines the social factor as the leading one to reduce mortality from unnatural causes and increase life expectancy.

When discussing the situation in the Russian regions, the question about a relationship between life expectancy and socio-economic development of the region is natural. Indeed, paradoxically, the North Caucasian national republics with the minimum GDP in Russia (less than 250 thousand per capita) find themselves in the area of well-being, while the Chukotka Autonomous Okrug, Kamchatka Krai, Magadan and Sakhalin Oblasts with GDP per capita about 1 million rubles or over, turn out to be in the area of distress. Tuva with the minimum life expectancy in Russian, has a little higher GDP compared to Dagestan (243 thousand vs. 232 thousand rubles), which was characterized by the maximum levels of life expectancy in Russia. On the other hand, Moscow and the Sakhalin Oblast are included in the richest Russian regions, and in terms of GDP per capita, the Sakhalin Oblast is 1.5 times higher than Moscow (2.4 million vs. 1.5 million rubles). Nevertheless, life expectancy among Muscovites exceeds the indicators of Sakhalin residents by almost ten years in males and six years in females. According to Revich et al. (2019), a rising scale of health expenditures, physical culture, and sports can result in the most pronounced mortality reduction only in the most developed regions, thus suggesting a compelling importance of high quality and favorable living conditions to reduce mortality.

At that, different climatic and geographical conditions in the Russian regions prevent these problems from being solved linearly. This is highly unlikely that the living conditions in Tuva or Buryatia with a heavy continental climate are comparable in terms of living conditions in the North Caucasus, and the climatic and geographical conditions of Chukotka or Sakhalin are less favorable compared to the Central European Russia.

However, in discussing the impact of socio-economic factors, the Tyumen Oblast should be emphasized. It includes the Khanty-Mansi and Yamalo-Nenets Autonomous Okrugs, which are located in the Far North, in absolutely unfavorable

climatic and geographical conditions; nevertheless, both regions are characterized by high life expectancy. The Tyumen region without these territories, located in less extreme climatic conditions, is included only in the middle area lagging for 2.5 and 1.5 years in male life expectancy. However, GDP per capita in the Khanty-Mansi Autonomous Okrug exceeds the indicators of the Tyumen Oblast without AO by more than three times, while Yamalo-Nenets Autonomous Okrug exceeds almost seven times, with 2.73 million and 5.7 million rubles vs. 822 thousand rubles, respectively. In this regard, we should mention the study by Nagaeva (2022), which indicates that although morbidity and mortality rates at working age in most resource regions are higher than in non-resource regions, multi-sectoral oil and gas producing regions are an exception, with the highest rates of life expectancy.

Thus, socio-economic factors are universal, but well-being in the regions with extreme climatic and geographical conditions requires investments in human development on a fundamentally different scale than sufficient for the regions with favorable living conditions.

Discussing epidemiological development and its determining components, it is important to dwell on new challenges: for example, the past COVID-19 pandemic showed the return of long-forgotten environmental factors. Moreover, its sudden onset and the scale of deaths make us remain on the alert in terms of possible new infections (or manifestations of the already existing ones) and, as a result, importance of the medical and social components to minimize them.

On the other hand, along with increasing life expectancy in post-industrial countries, endogenous pathologies acquire a different nosological profile: for example, in France, where life expectancy has exceeded the 80-year level, Alzheimer's disease, accompanied by dementia, takes the lead, with the mortality remaining completely unavoidable due to ambiguity of etiology and treatment methods.

Currently, the problem of a certain deadlock of the fourth stage of the epidemiological transition is far from being relevant to our country, however, increasing life expectancy does not exclude its actualization.

Conclusion

In conclusion, we should mention several considerations that represent significant aspects of the study of regional variation in mortality across the Russian regions.

First, based on the level of life expectancy on the one hand, and the triad of leading causes of death on the other, all Russian regions are currently at the third stage of the epidemiological transition.

Second, a combination of SD and AAD from endogenous causes (from life tables with multiple attrition) is a fairly effective tool for assessing stadal nature of the epidemiological development.

Third, in Russia, a simultaneous combination of high SD and high AAD from endogenous causes (diseases of the circulatory system and neoplasms) without any burden associated with exogenous causes is registered only in Moscow and St. Petersburg. Within the framework of the concept of epidemiological transition, this

indicates that of all Russian regions only Moscow and St. Petersburg are in the final phase of the 3rd stage transiting to the 4th stage of the epidemiological development.

Fourth, a characteristic feature of the Russian area of well-being, i.e., a group of regions with a relatively high life expectancy (according to Russian criteria), is a low share of death from external causes. At the same time, the burden of exogenous, preventable causes prevents the completion of the 3rd stage of the epidemiological transition in this area.

Fifth, in regions with medium and low levels of life expectancy, there is a high share of deaths from preventable causes, including injury and poisoning, reaching its maximum in the area of distress.

Sixth, stadial nature of the epidemiological development of the Russian regions is currently determined by socio-economic and medical determinants. In the regions with high and medium levels of life expectancy the medical determinant is more relevant, while in the regions with low life expectancy socio-economic factors are also associated with mortality from exogenous, preventable causes. A combination of these factors helps to minimize behavioral risks related to both deaths from external causes and early deaths from leading somatic causes, such as cardiovascular diseases and diseases of the digestive system.

As a result of the study, the following conclusion can be made. The theory of epidemiological transition allows us to conceptually assess the general problems of Russian regions, taking into account the main determinants of epidemiological development. This suggests that in regions with high and average levels of life expectancy, measures to improve the quality and accessibility of medical care are most relevant today. On the other hand, low life expectancy can be caused by both low income (Buryatia, Tuva) and social problems (for example, in regions with a high level of GDP, such as the Sakhalin Oblast and Kamchatka Krai).

In turn, the analysis of the main causes allows us to highlight the current problems of the regions from the standpoint of avoidable mortality. However, the development of specific recommendations aimed at reducing mortality in a particular territory requires a special in-depth study of the situation in this region.

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ARTICLE IN THE SPECIAL SECTION

Migrants From Central Asia in the Moscow Agglomeration: Social Well-Being and Demographic Attitudes

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ABSTRACT

The relevance of this study lies in the fact that it addresses the lack of empirical data needed for evidence-informed policy-making in the social, economic, and demographic realms in Moscow and the Moscow Oblast. It aims to explore migrants' emotional and evaluative attitudes toward their social reality, their role in it, and the unique demographic factors influencing their behavior. Specifically, the article seeks to characterize migrants' social well-being, identify factors detrimental to well-being, and outline conditions that facilitate trust, cooperation, and respect among individuals. The ultimate goal is to enhance socio-demographic well-being, unlocking migrants' full potential not only for socio-economic and demographic development in the Moscow agglomeration and society but also to help them achieve personal goals. The findings are based on a survey conducted in February–March 2023 in Moscow and Moscow Oblast, involving 766 migrants from Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan. The article analyzes how the problem of well-being is discussed in contemporary academic literature, refines the definition of the key concept, and substantiates the factors influencing the formation of migrants' social well-being and their demographic attitudes. The article provides an evaluation of the demographic situation in the Moscow agglomeration, along with some insights into the social well-being of migrants and their demographic attitudes. It also identifies problematic areas that pose challenges to the successful social adaptation of migrants.

KEYWORDS

migration, migrants, Central Asian countries, Moscow agglomeration, social well-being, demographic attitudes

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Introduction

Factors that make Moscow and Moscow Oblast, the largest and most developed agglomeration in Russia, particularly attractive to foreigners include favorable conditions for work, business, and education, thus leading to the growth in the number of foreigners residing there (Kolichestvo inostrantsev, n.d.). Most migrants come from Central Asian countries such as Uzbekistan, Tajikistan, Kyrgyzstan, and Kazakhstan (Stalo izvestno, 2022; V RF na zarabotki, 2023). Migration processes affect the labor market and alter the socio-demographic structure of the population. For migrants to contribute positively to the socio-economic development and demographic situation in the Moscow agglomeration, it is essential that they should have a positive perception of their living conditions, maintain positive relationships with the local community, and actively participate in social interactions. However, a clear understanding of what constitutes migrants' social well-being appears to be lacking. This challenge arises from the need to comprehensively measure individuals' emotional and evaluative attitudes towards their social environment, their role in it, and the demographic factors influencing their behavior. The current dearth of empirical information further exacerbates the issue by hindering initiatives fostering the integration of newcomers into the local community and influencing policy-making in the social, economic, and demographic spheres of Moscow and Moscow Oblast.

In light of the above considerations, the purpose of this study is to analyze the results of empirical sociological research and to propose a set of measures to improve the social well-being of migrants, foster trust, cooperation, and respect in society, enhance overall socio-demographic well-being in the Moscow agglomeration, and optimize the use of migrants' potential.

Literature Review

The concept of *social well-being* was introduced and delved into the works of such renowned scholars as Bekhterev (1997), Le Bon (1895/2006), Lippman (1922/2004), Parygin (1996), Tarde (1895/1996), and Viktorov (1903). These studies interpreted social well-being as a subjective characteristic representing the self-perception of the surveyed respondents as representatives of society.

Nowadays social well-being is examined from various perspectives and encompasses different aspects within the research field. This concerns the evolution of the concept, the primary factors influencing social well-being, the reasons for differences in opinions among various population groups, structural elements, and potential levels of expression. Scholars identify various parameters and criteria for delineating components of social well-being, along with its key characteristics (for more on this see, for example, Argunova & Kodina, 2013; Kornilova, 2015; Osinsky & Butueva, 2015; Usova, 2017).

Social well-being comprises both subjective and objective assessments as it reflects social moods, emotional nuances in relationships between members of society and groups, social hierarchy, activity in various spheres of social life, and confidence in the future.

The measurement of social well-being comprises various aspects of life and psychological comfort, including satisfaction with safety, health, family relationships, a comfortable living environment, and opportunities for creative self-realization (Kuchenkova, 2016, p. 118).

Lapin's comprehensive approach to measuring social well-being provides a means to describe an individual's self-perception of their status and satisfaction with existing needs. The characteristic feature of this approach is that it does not solely rely on emotional self-assessments (Lapin, 2007).

Addressing the elements of social well-being, distinctions are drawn between evaluations of internal states, i.e., health, mood, emotional states, dominant feelings, and evaluations of external conditions such as perception of the situation in the country and time in which a person has to live, confidence in the future (Zinurova & Fatykhova, 2011, p. 247).

Measurements of social well-being often rely on a tool known as the Integral Index of Social Well-Being (IISW) calculated based on indicators of social goods that cover key areas of life. These indicators form the value foundation of social activities: subjective satisfaction with one's life, opinions about one's current situation, and one's intentions for their future (Golovakha et al., 1998, p. 45).

The sociological category of social well-being has multiple aspects; hence, there can be variations in both its theoretical interpretation and empirical measurement. The index of social well-being can be calculated as the weighted arithmetic mean of several groups of specific indicators.

Lately, researchers have been increasingly focusing on the topic of the socio-economic well-being of migrants. Sadovskaia (2001) considers the social well-being of migrants as a factor contributing to their adaptation in a new society. Kobozeva (2008) studies the social well-being of labor migrants in the sociocultural conditions of the host region. Hasbulatova & Egorova (2002), as well as Poletaev (2018), consider the gender aspects of migrants' social well-being.

Importantly, socio-economic well-being is symbolically characterized by a positive or negative sign, serving as a summary indicator of the overall value within a specific social group, with a positive sign representing favorable conditions like high income and prosperity, and a negative sign indicating adverse factors such as economic instability or poverty (Klichenko, 2017). Thanks to such gradation, we have the opportunity for heuristic application of this approach when studying the socio-economic well-being of migrants.

Social well-being influences people's attitudes and behaviors, encompassing aspects like demographic attitudes. Traditionally, social attitudes are viewed as psychological and behavioral patterns based on an individual's own experience and their close social environment.

There are various kinds of social attitudes, including demographic ones. *Demographic attitudes* refer to a person's predisposition that determines his or her choices and is driven by positive or negative evaluations of particular demographic actions (Shakhot'ko, 2003). Demographic attitudes can be divided into matrimonial, reproductive, health-preserving, and migratory. They influence people's actual behavior.

Beck (1986/1992) and Giddens (1990) argued that the weakening of traditional family structures is inevitable in post-industrial societies. People are faced with a wide range of acceptable alternatives in almost every aspect of life, including the way they organize their family and approach childbirth.

Studies provide evidence of fundamental changes in demographic attitudes and behaviors among Europeans, including the delay in childbirth, cohabitation replacing official marriage, and so on. Modern processes are supposedly determined by changes in attitudes and values. And here, predictors include the economic development of states and other specific characteristics of countries (Aassve et al., 2013). Demographic attitudes and value orientations, however, play a key role in explaining people's demographic behavior (Moors, 1997; Thornton et al., 2007). The decline in mortality and fertility rates is a consequence of technological advancements as couples adapt to new circumstances by reducing their desired and actual number of children (Lesthaeghe & van de Kaa, 1986). In the new circumstances, there is no longer a need for having a large number of children as a means to guarantee support in old age. In countries with strong government support and social welfare, a liberal attitude towards demographic attitudes and behaviors prevails, often accompanied by a trend where individuals and couples are less reliant on the family and children in providing care in the old age and instead depend more on external support systems (Aassve et al., 2013).

During the demographic transition, there was a shift from high mortality and high fertility to low mortality and low fertility. As mortality rates began to decline, fertility rates also decreased (Lesthaeghe & van de Kaa, 1986). Individuals are increasingly prioritizing their own self-realization over having family or children, seeking not only economic but also psychological well-being. Low birth rates serve as an expression of demographic attitudes. Parents are becoming less reliant on children for support in old age and potential parents are more focused on satisfying their own needs and desire for self-realization (van de Kaa, 1994).

However, today we see a significant degree of heterogeneity in demographic attitudes worldwide, including in Europe. In certain countries, such as Scandinavia, divorce, cohabitation, and non-marital childbirth are widespread. Meanwhile, in other nations, notably in the Mediterranean region, there is a stronger emphasis on traditional perspectives regarding family and childbirth. In affluent countries, people have access to higher levels of education and education is of better quality. It has been proven that education promotes the spread of nonconformity, diminishes the significance of religion, and increases tolerance towards non-traditional demographic behavior (Thornton et al., 2007). There is also evidence that education is associated with a more respectful attitude towards the family (De Feijter, 1991).

Another important aspect is that men and women are playing increasingly similar social roles. Interestingly, traditional gender differences persist primarily among individuals with lower levels of education (Oláh et al., 2023). In conditions of gender equality, women can make decisions about entering into marriage or cohabiting, having or not having children, and continuing to work while raising children (Aassve et al., 2013).

Significant changes have also occurred in the composition of families and households, particularly there has been a substantial increase in the number of childless couples and one-person households (Jain, 2023). In general, there is a dual trend towards re-traditionalization and liberalization, while there is also continued support for traditional values (Spéder, 2023). Evolving demographic attitudes have a direct influence on people's well-being.

Methodology

We interpret the socio-economic well-being of migrants as an indicator that reflects the extent of their successful adaptation. It also serves as a comprehensive measure of personal life satisfaction and orientation towards perspectives and opportunities for implementing life strategies. It is the result of an individual's awareness and experience of the objective conditions and the meaningful content of their life (Bochkanova, 2007; Petrova, 2000; Rubina, 1996; Volkov, 2003).

Considering that there is a lack of universal sociological methods for measuring social well-being, this study uses the following empirical indicators of socio-economic well-being. In the economic sphere, these indicators include employment, job satisfaction, relationships at work, the ability to provide for the family, and satisfaction with one's financial situation (financial security). In the social sphere, these indicators are family relationships, satisfaction with the place and conditions of living, education opportunities, access to health care, opportunities for taking vacations and opportunities for recreation, physical activity, and sports. Additionally, the study takes into account migrants' evaluations of social mood, prospects, and opportunities for realizing their life plans.

To calculate the level of social well-being, we used the methodology for calculating indices developed by Krasil'nikova (2003). The composite index of social well-being is calculated as a simple arithmetic mean of individual indices (p. 51). If the index is equal to or greater than 160, it indicates a high level of social well-being; if it is equal to or less than 40, a low level; if it falls within the range of 80 to 120, an average level; if it is in the range of 121 to 159, it is above average; and if it is between 41 and 79, below average.

Demographic attitudes are understood here as the subjective preferences of migrants related to specific aspects such as the number of children they wish to have, the age at which they enter into marriage, migration, etc. These preferences regulate individual behavior, shape a specific type of demographic reproduction in the population of the Moscow agglomeration, and determine the current direction of key demographic processes (Antonov & Medkov, 1987; Antonov, 2013; Antonov & Laktiukhina, 2012).

Empirically, the study relies on the results of a questionnaire survey conducted from February to March 2023 in Moscow and Moscow Oblast. The survey covered 766 people (201 from Kazakhstan, 175 from Kyrgyzstan, 199 from Tajikistan, and 191 from Uzbekistan). Respondents were chosen through a non-random, non-representative purposive sampling method. The selection was based on three criteria: citizenship (Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan), location (Moscow and Moscow Oblast), and age (18–45 years).

The sample includes age cohorts of 18–25, 26–35, and 36–45 years in equal proportions. The proportion of men and women aligns with the approximate gender structure of migrants, providing grounds for comparing data on the social well-being and demographic attitudes of migrants from Central Asia in Moscow Oblast. Since the sample does not pretend to be representative, it was decided to focus on general characteristics that give an idea of the reproductive and matrimonial attitudes of migrants in Moscow.

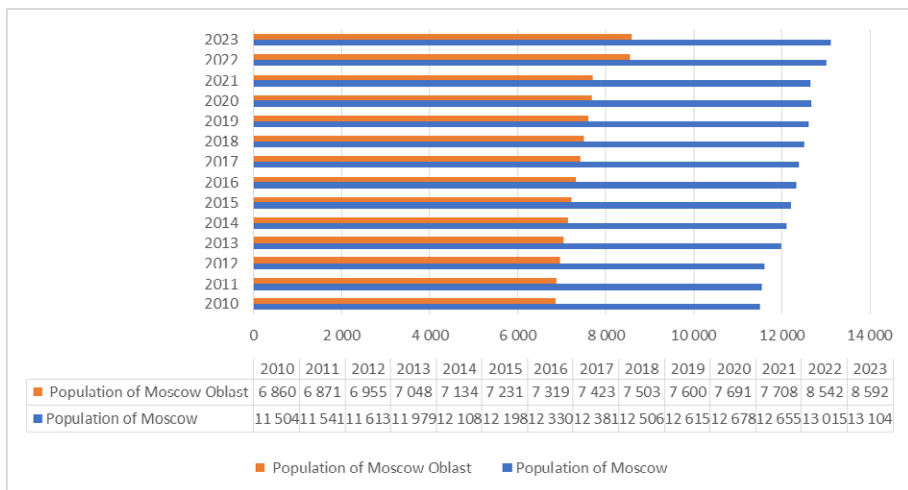
Results

Demographic Situation in the Moscow Agglomeration

The history of the Moscow agglomeration attests to the constant growth in its population. In the 2000s, the increase in population became particularly noticeable. According to official data, in 2010, 11,504 thousand people lived in Moscow and 6,860 thousand in Moscow Oblast; in 2023 there were 13,104 thousand people, that is, the population increased by 1,600 thousand people in Moscow and 8,592 thousand people in Moscow Oblast increasing by 1,732 thousand people (Figure 1).

Figure 1

Population of Moscow and Moscow Oblast in 2010–2023 (Thousand People)



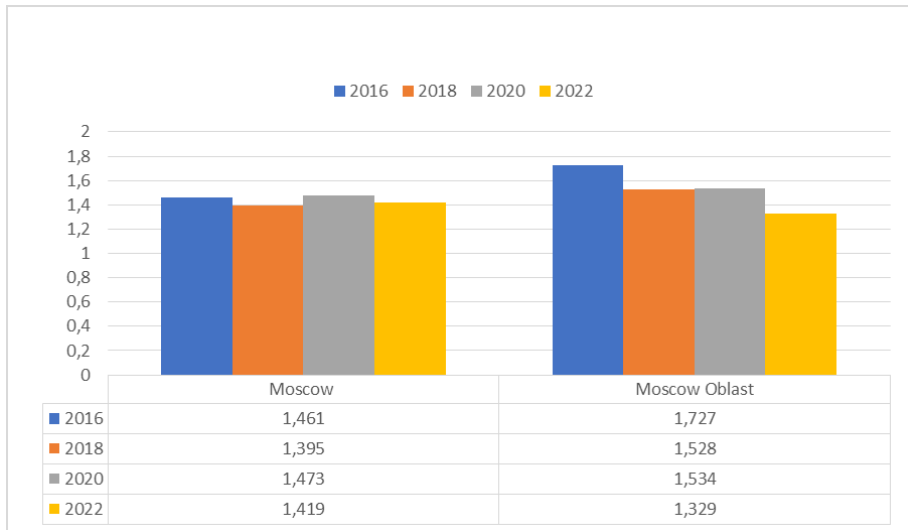
Note. Source: Mosstat (n.d.-a, n.d.-b).

In the capital region, according to experts, a large number of people live and work without registration or work permits, making it impossible to accurately determine the actual population of the Moscow agglomeration. It is also worth noting that there is the imbalance in the age and gender structure of the population, with the predominance of elderly individuals in the distribution across age groups and a shortage of the necessary labor resources for socio-economic development (Mosstat, 2023a, pp. 15–16, 19–20).

As for the demographic situation, it should be noted that Moscow and Moscow Oblast mainly grew due to migration. Additionally, the capital also expanded through direct administrative annexations, where neighboring settlements and villages became part of the city. The total fertility rate (the number of children per woman) in Moscow decreased from 1.461 to 1.419 in 2016–2022, while in Moscow Oblast, it declined from 1.727 to 1.329, indicating a 23% decrease (Figure 2).

Figure 2

The Total Fertility Rate in Moscow and Moscow Oblast (Number of Children per Woman) in 2016–2022



Note. Source: Mosstat (n.d.-a, n.d.-b).

Since 2020, a natural population decline has become characteristic of Moscow’s population, while in Moscow Oblast, it increased 17 times over the period from 2017 to 2021. This was due to a decrease in birth rates and an increase in mortality, which became particularly noticeable in the COVID-19 year of 2021 (Table 1).

Table 1

Natural Population Growth and Decline in 2017–2021 in Moscow and Moscow Oblast per 1,000 People

Year	Moscow	Moscow Oblast
2017	1.1	–0.4
2018	0.8	–1.2
2019	1.2	–2.5
2020	–2.0	–4.2
2021	–3.3	–6.8

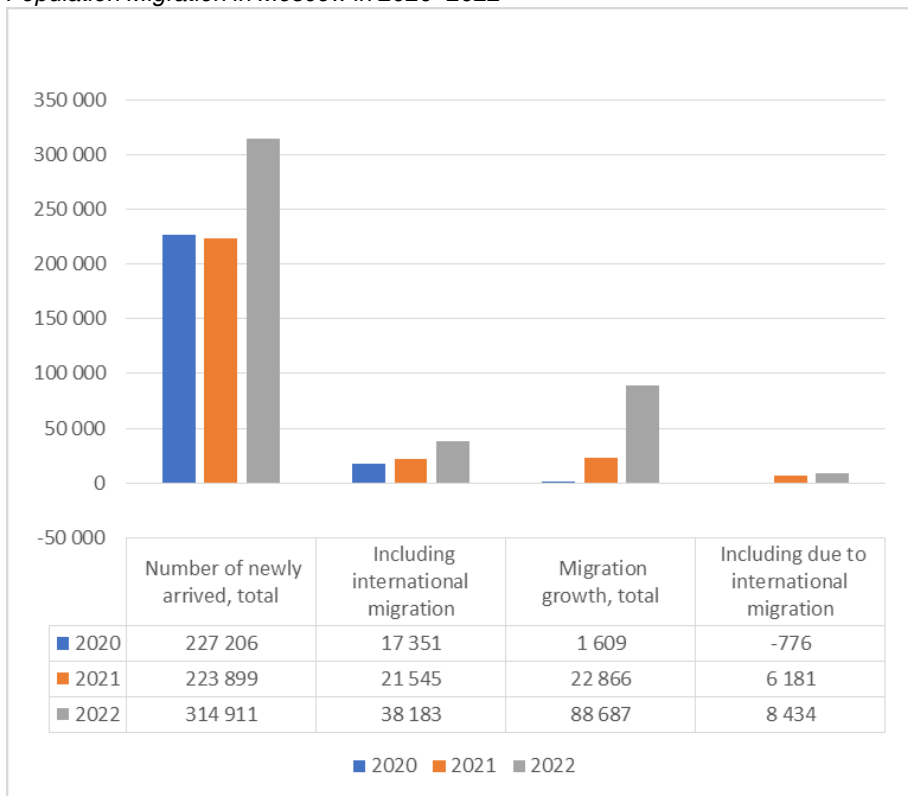
Note. Source: Mosstat (2020, p. 41, 2022a, p. 21, 2022b, p. 29).

The trend of a later marriage, especially among women, does not give hope for an improvement in the situation. According to the data of the Moscow Civil Registry Office, the average age of brides today is 32 years, and of grooms, 34.1, with 31% entering into a second marriage¹. In 2022, 20.3% of babies in Moscow and 21.3% in Moscow Oblast were born outside of a registered marriage (Rosstat, 2023).

Despite the gradual recovery of migration growth to Moscow in recent years to its pre-pandemic levels (Mosstat, 2022a, 2023a), Rosstat [Federal State Statistics Service] reported a decline in these rates for the period from January to July 2023. While migration growth amounted to 38,035 people in January–July 2022, for the same period in 2023, this figure was only 10,088 people (Mosstat, 2023b; Figure 3).

Figure 3

Population Migration in Moscow in 2020–2022



Note. Source: Mosstat (2023b, p. 18).

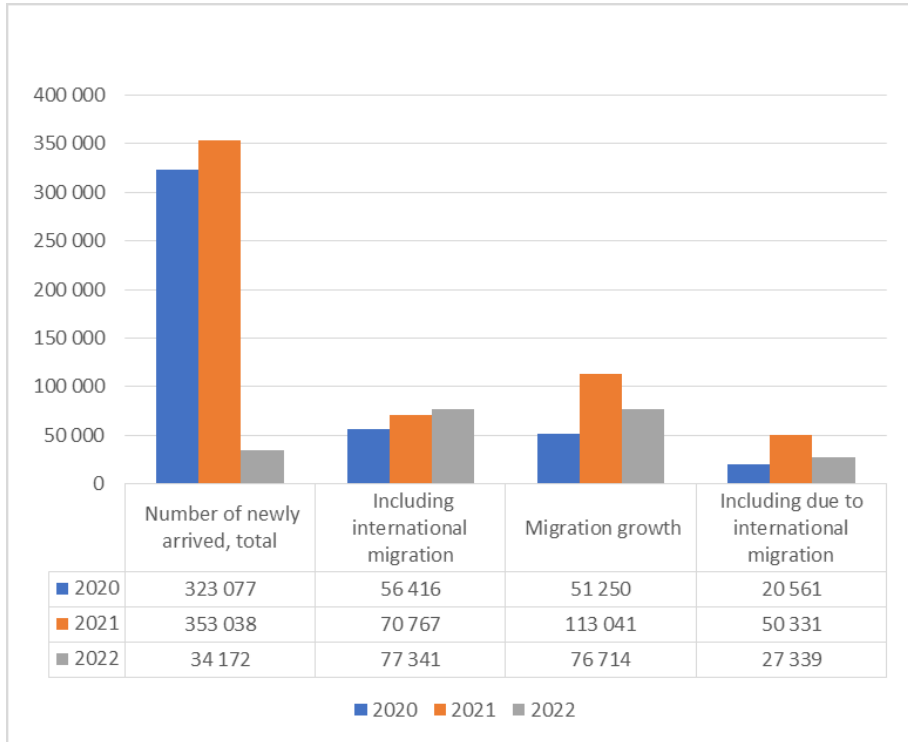
Moscow Oblast, however, maintained its attractiveness for foreigners from 2021 to 2023 and became a leader in migration growth (Figure 4). Here, not only are the chances of employment higher than in the capital but also more affordable urban housing is being developed, which enables migrants to retain the opportunity to find employment within the city (Nikitina, 2021). In January–July 2022, there was an

¹ <https://zags.nalog.gov.ru/analytics/marriage>

increase of 39,095 people, while for the same period in 2023, it was 47,586 people (Mosstat, 2023a).

Figure 4

Population Migration in Moscow Oblast in 2020–2022



Note. Source: Mosstat (2022a, p. 21, 2023a, pp. 21–22).

The majority of migrants that arrive in the Moscow agglomeration come from such Central Asian countries as Uzbekistan, Tajikistan, Kyrgyzstan, and Kazakhstan (V RF na zarabotki, 2023). They influence the social and demographic well-being of the region, alter its age and gender structure, and impact the reproduction regime, social well-being, and the quality of life. In the Moscow agglomeration, during the period between the censuses of 1989–2010, migration not only compensated for natural population decline but also contributed significantly to population growth, making a substantial contribution to births (Doronina, 2019, p. 131).

Experts predict a decline in birth rates and an increasing trend of population aging in several Central Asian countries over the next 15 years. For example, according to the official data of the Kyrgyz Republic, these trends are already evident today. The birth rate in the country has been decreasing in recent years. While in 2015, there were 3.9 births per woman aged 15 to 49, by 2022, this indicator had decreased to 2.81 births per woman. Each year, the proportion of the population aged over 65 is increasing

(Osadchaya et al., 2023). This could influence attitudes towards migration to Russia, provided that there is an improvement in the conditions of regional labor markets.

As we can see, the demographic situation in the Moscow agglomeration is somewhat challenging. As a result, the extensive and diversified labor market of Moscow and Moscow Oblast experiences a high demand for personnel with any level of education and qualification. Both entry-level and highly skilled workers are needed. In this situation, migrants typically occupy positions in the economy of Moscow and Moscow Oblast that are not actively sought after by the locals. Social well-being, which is not just an indicator of how people perceive social reality, including labor relations, but also a catalyst for both active and passive social behavior, finds direct expression in the political and economic activities of a country's population. This is what determines the need for the sociological analysis of social well-being.

Social Well-Being of Migrants From Central Asia to the Moscow Agglomeration

To assess the integral index of social well-being, we divided social well-being into three aspects: well-being in the economic sphere; well-being in the social sphere; and socio-psychological well-being, which was measured by the index of social expectations.

A high level of social well-being in the economic sphere is characteristic of migrants from Kazakhstan. It should be noted that this estimate is at the very bottom end of its value range. The opportunities for good nutrition, the wage level, the ability to dress well, as well as the alignment of the job with migrants' knowledge, skills, and capabilities receive the highest evaluations. The level of social well-being among migrants from the other three countries (Kyrgyzstan, Tajikistan, and Uzbekistan) is above average. Migrants from all the four countries assess wage levels as high. Despite these assessments, the lowest scores were given to financial security, which could be explained by the fact that migrants have to send a significant portion of their income back to their home country (Table 2).

Table 2

Composite Index of Social Well-Being in the Economic Sphere and Its Component Sub-Indices

	Kazakhstan	Kyrgyzstan	Tajikistan	Uzbekistan
Wage levels	163.2	166.9	164.9	160.2
Match between the job and the person's skills and qualifications	162.2	162.2	170.0	157.0
Job satisfaction	160.2	165.8	158.8	164.4
Financial security	147.7	146.3	142.2	139.3
Nutrition	165.7	156.6	162.3	162.3
Clothes	162.7	153.1	153.1	155.0
Composite index of social well-being in the economic sphere	160.3	158.5	158.9	156.4
	High	Above average	Above average	Above average

Note. Source: authors' calculations.

The level of well-being in the social sphere is assessed by migrants from all four countries as above average; however, this figure significantly varies among migrants from different countries. The highest level is characteristic of migrants from Kazakhstan, while the lowest, from Tajikistan. We believe that the above-average level is influenced by the health status index, rated as high by migrants from all countries, which is quite understandable: migration typically involves the younger generation and young people do not yet face serious health problems.

For migrants from Kazakhstan and Kyrgyzstan, the most problematic areas in the social sphere are the opportunities for taking vacations and holidays. Opportunities for taking vacations and holidays also present a significant issue for migrants from Tajikistan and Uzbekistan, but they expressed even greater concern about the limited opportunities for education. The challenges in obtaining education for migrants from these countries, in our opinion, are primarily linked to the fact that they are less proficient in the Russian language compared to migrants from Kazakhstan and Kyrgyzstan (Table 3).

Table 3

Composite Index of Social Well-Being in the Social Sphere and Its Component Indices

	Kazakhstan	Kyrgyzstan	Tajikistan	Uzbekistan
Health status	173.1	170.3	163.3	164.4
Housing conditions	157.2	153.2	134.2	142.9
Health care	152.2	141.1	131.6	138.2
Opportunities for taking holidays and vacations	134.4	132.0	126.6	120.9
Opportunities for recreation and leisure	158.7	150.3	136.7	151.3
Opportunities for physical activity and sports	160.2	154.3	142.3	144.0
Education opportunities	144.3	130.9	119.1	119.9
Social services	146.2	134.9	124.6	132.0
Composite index of social well-being in the social sphere	153.3	145.9	134.8	139.2
	Above average	Above average	Above average	Above average

Note. Source: authors' calculations.

We proceeded from the premise that the realization of migrants' social expectations is one of the key indicators influencing their perception of their socio-economic, socio-political, and spiritual opportunities, as well as their perception of their income and social status (Morev & Kaminskiy, 2014). This, in turn, has a certain impact on the social activity of migrants (Yatsenko, 2006), shaping the socio-psychological aspect of well-being.

According to our calculations, migrants from all countries have shown a high level of fulfillment of their social expectations. The expectations were least fulfilled for migrants from Tajikistan (Table 4).

Table 4
Index of Social Expectations

	Kazakhstan	Kyrgyzstan	Tajikistan	Uzbekistan
Index of social expectations	184.6	184.4	172.3	184.3
	High	High	High	High

Note. Source: authors' calculations

Table 5
Integral Index of Social Well-Being

	Kazakhstan	Kyrgyzstan	Tajikistan	Uzbekistan
Composite index of social well-being in the economic sphere	160.3	158.5	158.9	156.4
Composite index of social well-being in the social sphere	153.3	145.9	134.8	139.2
Index of social expectations	184.6	184.4	172.3	184.3
Integral index of social well-being	166.1	162.9	155.3	160.0
	High	High	Above average	High

Note. Source: authors' calculations.

The integral index of social well-being points to the fact that the social well-being of migrants from Kazakhstan, Kyrgyzstan, and Uzbekistan in the Moscow agglomeration can be assessed as high, while that of people from Tajikistan is above average. High evaluations of social well-being are primarily linked to the realization of the expectations that migrants had upon arriving in Moscow.

Our analysis of social well-being among two groups of migrants: those who plan to return to their home country and those who do not plan to do so, shows that those who are more satisfied with the economic, social, and socio-psychological aspects of their life in Russia do not plan to return to their homeland. We have also found that the integral index of social well-being is high for the second group, and above average for the first group. Despite being less satisfied with their economic status and even less so in the social sphere, migrants in this group have high social expectations from migration, which compensates for the lower ratings in other areas of life.

Table 6
Integral Index of Social Well-Being in the Economic Sphere and Its Component Sub-Indices Among Migrants (Those Planning to Return to Their Home Country and Those Not Planning to Do So)

	Planning to return to their home country	Not planning to return to their home country
Economic sphere		
Wage levels	143.5	175.2
Match between the job and the person's skills and qualifications	151.6	177.7

Table 6 Continued

	Planning to return to their home country	Not planning to return to their home country
Job satisfaction	149.7	179.2
Financial security	134.7	155.5
Nutrition	153.7	168.4
Clothes	146.3	168.8
Composite index of social well-being in the economic sphere	146.6	170.8
	Above average	High
Social sphere		
Health status	159.6	174.9
Housing conditions	138.1	156.8
Health care	123.2	156.0
Opportunities for taking holidays and vacations	118.1	145.2
Opportunities for recreation and leisure	138.5	160.7
Opportunities for physical activity and sports	142.5	155.6
Education opportunities	116.0	145.5
Social services	120.1	149.9
Composite index of social well-being in the social sphere	132.2	155.6
	Above average	Above average
Index of social expectations	174.3	182.5
	High	High
Integral index of social well-being	151.0	169.3
	Above average	High

Demographic Attitudes of Migrants From Central Asia

Demographic priorities are shaped by numerous factors, including individual characteristics, health status, satisfaction with personal life, social status, confidence in the future, and others. However, as our study demonstrates, a crucial determinant is shared values. Eight out of 10 respondents highlighted the significance of national and religious traditions and customs. The overwhelming majority of respondents consider starting their own family as the main life goal/achievement (Yes, completely agree/more yes than no, migrants comprise 83.6%).

Marital orientations. According to our research, 37.6% of migrants are officially married, and 40.2% are single (not married). It should be noted that among the respondents, there is no significant difference in marital status across Central Asian countries. The number of single men is higher compared to the number of unmarried women (43.6% of men, 35.4% of women). This confirms the hypothesis that women

more often migrate with their husbands. By the age of 36–45, 61% of the respondents are officially married.

In the surveyed age groups, 12.0% are in a “civil marriage” (cohabiting). Extramarital relationships indicate the development of various forms of cohabitation in Moscow, reflecting a tolerant attitude towards both unregistered partnerships and extramarital births. This confirms experts’ opinion that living conditions in migration, in particular detachment from the family, reduce the taboo among migrants on unregistered forms of marriage.

It is possible that the survey data may not fully reflect the situation in the marriage market of the capital region. Studies of family-marriage behavior of labor migrants provide evidence that there has been an increase in bigamy (Barsukova & Chasovskaia, 2016). The main reasons cited for married labor migrants in Russia entering into another relationship include a desire to obtain local registration in Russia, practical conveniences, support from local women, and the pursuit of emotional and sexual relationships that migrants may lack when separated from their families. Experts have highlighted the emergence of an illicit industry, noting an increase in facilitating marriages with the primary aim of obtaining Russian passports (Ul’masov, 2019).

The facts of entering into new relationships (cohabitation or forming another family in Russia) while having a family in the home country confirm our research findings. A fifth of the respondents themselves had to deal with such cases, while about half of them reported hearing about it. These data were obtained in all respondent groups, by gender and age.

The majority of respondents consider mutual love, respect, and fidelity to their partner as essential values for creating and functioning in their family. The older our respondents are, the more they value loyalty to their partner and agreement between spouses on all key matters.

Most respondents favor the hierarchical family structure over more egalitarian models. They are oriented towards the patriarchal model, which represents an authoritative system led by a husband or someone from the older generation. However, it should be noted that younger respondents more often demonstrate commitment to a democratic, egalitarian distribution of roles in the family.

Reproductive Attitudes. To obtain a clearer insight into the reproductive behavior of respondents, inquiries were made regarding the exact number of children under their care. A quarter of migrants have one child and a fifth have two children. 15% of migrants have three or more children. Migrants from all countries take care of approximately the same number of children (both in the Moscow agglomeration and in the home country). In other words, there is a prevalence of families with 1–2 children among respondents aged 18 to 45.

Remarkably, there is a disparity in the age at which migrants and residents of the Moscow agglomeration have their first child. Newcomers to the Moscow agglomeration opt for having children earlier, which improves the prospects for future births. In the group of migrants aged 18–25, 13.9% of the respondents already have children. As the survey revealed, some migrants would prefer not

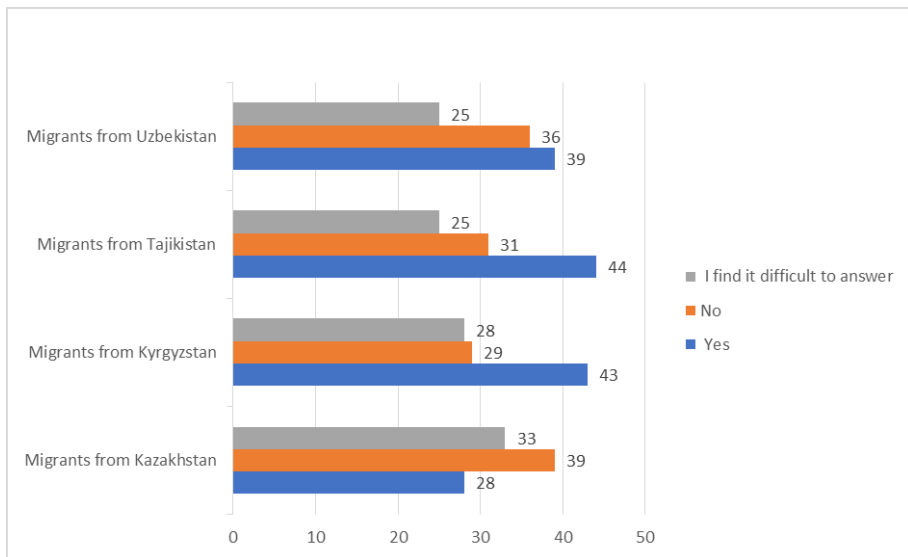
to have any children; 41.5% of migrants would like to have 1–2 children; 42.1% are oriented towards a large family by Russian standards (three or more children). Thus, we can conclude that migrants from the Central Asian republics maintain a higher potential for reproductive behavior. However, it is important to note that there is always a gap between the desired and actual number of children as people’s ideal reproductive plans are often not attainable due to various life circumstances and unexpected events.

Migration Attitudes. Among those surveyed, 38% plan to return to their home country, 34% do not plan, and 28% are undecided. Less frequently, return migration strategies were demonstrated by migrants from Kazakhstan, that is 28%, which can be explained by Kazakhstan’s shift

away from the widespread use of the Russian language, gradually displacing it from all spheres, from education to government administration, from culture to industry. This is coupled with a policy of gradually filling leadership positions in government, education, and industry with national personnel. Additionally, there is an effort to provide children with quality education in the Russian language, which opens up significant employment opportunities across the entire space of the former Soviet Union”. (Koloskov, 2023; Trans. by Ekaterina Purgina)

Citizens of Kyrgyzstan tend to be oriented towards return migration more often with 43% planning to return. Kyrgyzstan is followed by Tajikistan, with 44% of those who plan to return, and 39% from Uzbekistan (Figure 5).

Figure 5
Percentage of Migrants Planning to Return to Their Home Country (In Percentage of Those Surveyed)



In each group, there is approximately an equal number of men and women, both single and married, in an official or civil partnership. Among those planning to return, there are 1.8 times more respondents in the 26–35 age; 12.3% more individuals with incomplete secondary and secondary education; and those living in the capital on their own, without a family. Among those planning to stay in Russia, there are twice as many individuals with higher education, those who combine studies and work, and 3.8 times more individuals who see themselves as future citizens of Russia (Table 7).

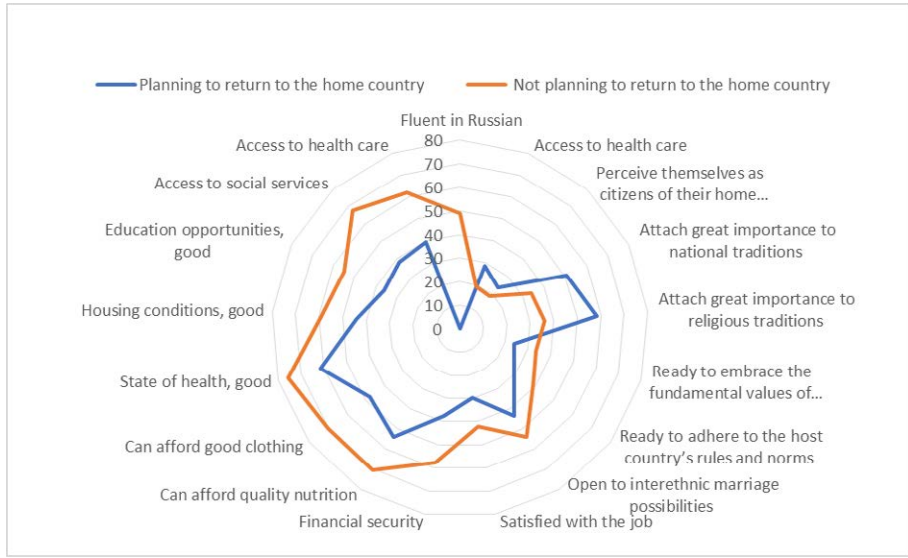
Table 7

Socio-Demographic Profile of Respondents Planning to Return to Their Home Country (In Percentage of Those Surveyed)

	Variable	Yes	No	Undecided
Gender	Male	42 (row-wise) 64.6	32 (row-wise) 55.6	26 (row-wise) 55.4
	Female	33 (row-wise) 35.4	37 (row-wise) 44.4	39 (row-wise) 44.6
Age	18–25	33.9	46.2	43.3
	26–35	44.6	24.4	32.8
	36–45	21.4	29.5	23.9
Education	Incomplete secondary/ secondary education	45.6	30.9	24.4
	Secondary vocational education	36.1	30.9	48.8
	Higher education	17.6	37.1	23.9
Marital status	Single	37.4	41.3	42.7
	Married	42.5	34.7	34.3
	In a civil partnership	11.6	12.4	12.2
In Moscow	Alone	41.2	29	37.1
	With a spouse	13.6	15.4	18.8
	With a spouse and a child/ children	16.3	17.0	14.1
Employed		73.8	61.4	70.9
Study and work		11.9	23.9	17.8
See themselves as citizens of Russia in the future		10.9	41.3	19.7

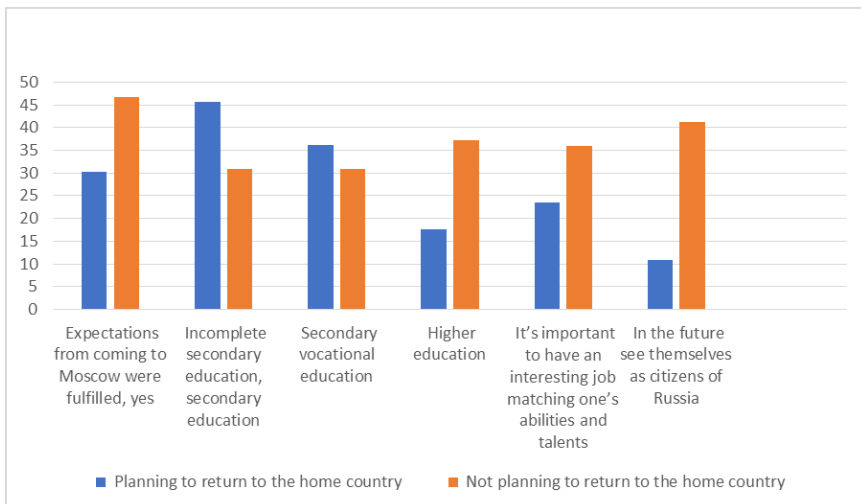
Migrants in the group planning to return place greater importance on religious and national traditions. Additionally, they self-report lower proficiency in the Russian language compared to those who do not intend to return. Meanwhile, the groups not planning to return exhibit higher satisfaction ratings with daily life and accessibility of social and medical services. They also have a good to excellent level of proficiency in the Russian language (Figure 6).

Figure 6
Respondents' Satisfaction With Various Aspects of Everyday Life Depending on Migration Strategies (As a Percentage of Those Surveyed)



The main distinctions in this group hinge on whether migrants' expectations were met upon arriving in the Moscow agglomeration, the availability of interesting job opportunities, the chance to showcase their skills and talents, and the aspiration to obtain Russian citizenship (Figure 7).

Figure 7
Factors Influencing Respondents' Choice of a Migration Strategy (In Percentage of Those Surveyed)



Discussion and Conclusion

Due to the unfavorable demographic situation in the Moscow agglomeration, there is a high demand for skilled personnel in the labor market. The migration decisions of citizens from Kazakhstan, Kyrgyzstan, Tajikistan, and Uzbekistan are influenced by their social well-being in the capital region. Thus, respondents who do not plan to return to their home country have a higher integral index of social well-being. In this group, there is a higher percentage of people satisfied with the economic, social, and socio-psychological aspects of their life in Russia. For those migrants who plan to return to their home country, the level of social well-being is above average. There are, however, some differences depending on migrants' country of origin. The integral index of social well-being points to the fact that migrants from Kazakhstan, Kyrgyzstan, and Uzbekistan enjoy a high level of social well-being in the Moscow agglomeration, while for migrants from Tajikistan its level is above average.

A high level of social well-being in the economic sphere is characteristic of migrants from Kazakhstan, while migrants from the other three countries experience it at an above-average level. Wage levels are assessed as high. The lowest scores were given to financial security by migrants from all the four countries.

The level of social well-being in the social sphere for migrants from all four countries is above average. The highest level is characteristic of migrants from Kazakhstan, and the lowest, from Tajikistan.

For citizens of Kazakhstan and Kyrgyzstan, the most problematic areas in the social sphere are opportunities for taking vacations and holidays while migrants from Tajikistan and Uzbekistan are more concerned about the lack of opportunities for obtaining education. Difficulties in obtaining education for migrants from these countries, in our opinion, are primarily linked to their insufficient proficiency in the Russian language compared to migrants from Kazakhstan and Kyrgyzstan. We found that for migrants from all the four countries, their social expectations are realized at a high level. The expectations were least fulfilled for migrants from Tajikistan.

The demographic attitudes of migrants are influenced by national and religious traditions. The overwhelming majority considers their main life goal/achievement to be the creation of their own family. The older the respondents, the larger the proportion of those who are oriented towards the patriarchal model. Young respondents more frequently demonstrate a commitment to a democratic, egalitarian distribution of power within the family. Meanwhile, there is a growing trend of labor migrants entering into second unions, with one in eight respondents engaging in informal cohabitation or "civil partnerships" while maintaining their original family ties.

Migrants from the Central Asian republics exhibit higher fertility rates: 42.1% of migrants are oriented towards a large family model by Russian standards (three or more children). A notable characteristic of the age-related birth pattern among newcomers to Moscow Oblast is the occurrence of earlier childbirths, which improves the prospects for future births. Approximately one-third of migrants plan to return to their home country, while an equal proportion has no such plans. Citizens of Kyrgyzstan, Tajikistan, and Uzbekistan are more often oriented towards return

migration. Respondents that are not planning to return exhibit higher satisfaction with daily life, find social and medical services more accessible, demonstrate advanced or excellent knowledge of the Russian language, feel that their expectations upon arriving in Moscow region were fulfilled, aspire to have an interesting job, matching their abilities and talents, and are willing to obtain Russian citizenship.

The novelty of the research is determined by the distinctive nature of sociological analysis, manifested in the ability to examine the social well-being and demographic attitudes of migrants from Central Asia based on direct empirical data. This includes characteristics of personal life satisfaction across various aspects (spheres, domains), the living environment, and orientation towards perspectives and opportunities for implementing life strategies.

Studying the well-being and attitudes of migrants from Central Asia in Moscow helps improve our understanding of socio-economic and demographic issues in Russia. It includes broadening our theoretical and methodological understanding of the issue, offering significant explanatory potential. This expands the research scope of demography and migration sociology, providing new insights into issues related to the growing role of migrants in the socio-economic and demographic development of the Moscow agglomeration.

The research findings can be valuable for policy-makers in designing and implementing measures to enhance the social, economic, and demographic well-being of the capital. The most prominent concerns among migrants are such issues as obtaining registration documents, securing social insurance, and navigating administrative barriers in employment. Therefore, to enhance conditions for their adaptation, more institutional support is needed in these areas.

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ARTICLE

Trial of Memory: Legal Regulation as a Tool of Memory Politics in Contemporary Russia

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ABSTRACT

The article examines how law enforcement sanctions, typically applied to real-life actions, are being transferred to online activities. Building on François Hartog's ideas, the study links memorial legislation to a new "regime of historicity," highlighting its unique role in commemoration. By examining relevant laws and media discussions, the study follows the evolution of memorial legislation, demonstrating its importance in commemorating the Great Patriotic War in post-Soviet symbolic politics. Analysis of the amendments to Article 354.1 of Russia's Criminal Code from its original formulation in 2014 to the revisions in 2021 reveals the shifting legal landscape surrounding online commemorative practices. As virtual spaces are gaining prominence in public discourse and legal interpretations, the boundaries between online activities and real-world actions are becoming increasingly blurred. The key trends in this process include the growing reliance on virtual platforms for information dissemination, the evolving notion of publicity in legal contexts pertaining to online behavior, and the broadening enforcement of Article 354.1. This research sheds light on the intricate interplay between memory politics, virtual spaces, and legal frameworks, reflecting broader societal shifts in information consumption and expression.

KEYWORDS

politics of memory, historical memory, commemorative legislation, order of time, memory on the network, regulatory regulation, rehabilitation of Nazism

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Introduction

The use of legal regulations in memory politics has a rich history. The global surge in such laws is closely linked to the development of a collective European memory, centered on the Holocaust. Germany and Austria were pioneers in implementing Holocaust denial laws shortly after the Second World War. In France, such legislative acts were passed in 1990 following the case of Robert Faurisson, who claimed that the Holocaust was fabricated by Zionists. In Belgium, similar laws were adopted a bit later, in 1995. The USA and UK currently have no specific memorial laws because they are viewed as constraints on freedom of speech. Italy, Finland, and Japan also oppose such legislation. Despite the fact that memorial legislation in European countries aims to protect the established perception of the Holocaust, some states also acknowledge the Armenian genocide by the Turks, and in certain Eastern European countries, such as, for example, Bulgaria, there is a ban on the use of Soviet symbolism (Campbell, 2013; Kopusov, 2011; Nowak, 2015).

Kopusov (2011) argues that there are two types of regulatory acts that can be described as memorial laws. Memorial laws of the first type can be declarative, that is, they assert a definitive evaluation of certain past events and determine the set of historical facts considered symbolically important for society (for example, the European Parliament resolution of 2 April 2009 on European conscience and totalitarianism). The second type of memorial laws refer to specific regulatory acts that stipulate administrative or criminal liability for the interpretation of the past that does not correspond to state or public interests (Kopusov, 2011, p. 62). The difference between these types of laws lies in the fundamental significance that they attribute to a specific historical event in shaping national identity. In contrast to the production of history textbooks, films, media publications, and scripts for state festivities, memorial laws not only transmit a particular representation of the past but also impose penalties for expressing alternative viewpoints. Therefore, a particular interpretation of history is declared as the only correct one, rendering debates unlawful, while the potential for punishment frames legislative practices as a means of fighting for historical truth. In this article, the focus will be made primarily on the second type of laws.

Another crucial aspect to consider is the dynamics of legal regulation of memory politics (including in cyberspace) in contemporary Russian society, which includes the series of memorial laws adopted from 2014 to 2021, specific cases from law enforcement practice, and trends in the development of the regulatory framework for memory politics. Empirically, the study draws upon relevant legislative acts, as well as media narratives discussing their application.

Memorial Laws as Instruments of Memory Politics

In the early 1990s, Western European countries reached a “never again” consensus, prompting them to take measures safeguarding the symbolic foundation of pan-European identity against potential distortions and doubts (Assmann, 2010). Meanwhile, Eastern European nations and post-Soviet countries faced a more complex historical dilemma. The collapse of the socialist bloc led Eastern European countries to not only determine their future political trajectory but also to decide on a symbolic vision of the past that would serve as the foundation for their chosen path. The gradual integration of Eastern European and Baltic countries into Western European memory culture took several decades and found reflection in Holocaust denial laws. In the Czech Republic, such a law was adopted in 2001, in Romania in 2002, and in Hungary in 2010 (Nowak, 2015).

As Eastern European countries transitioned from socialist systems, they started to scrutinize Soviet portrayals of history, particularly interpretations of the Second World War. For these nations, adopting the Western European perspective on the Holocaust as the ultimate crime against humanity posed potential conflicts with their own historical narrative. While they sought integration into the wider European cultural and economic sphere, they hesitated to reevaluate aspects of their history that might unearth sensitive and conflicting issues (Nowak, 2015).

In post-Soviet Russia, similar processes took place, albeit with some delay; since 2014, one could observe a gradual transition from declarative acts to concrete measures of administrative and criminal prosecution. Russian authorities largely focused on the legacy of the Second World War, much like in Western Europe, although from a fundamentally different perspective. While the memory of the Holocaust, as interpreted by Habermas (1962/1989), was meant to symbolize a shared tragedy around which a new European identity could be constructed, for the disillusioned segments of Russian society, who were frustrated by the political and economic collapse of the 1990s, the issue of glorification, rather than victimization, proved to be more significant. In other words, the surge in public interest in the Great Patriotic War in the mid-1990s can be interpreted as a natural reaction to the overall deterioration of the socio-economic and political climate, an endeavor to emphasize the significance of the victory over Nazi Germany not only on a national but also on an international scale. It could be said that the sine wave of memory politics in Russia has completed another cycle, similar to the resurgence of the theme of the Great Patriotic War in the mid-1960s (Golovashina, 2017). However, it seems paradoxical that this renewed interest in the heroic past aligns with the gradual disappearance of war participants from active social life. Essentially, the right to speak about the victory and represent the victors was passed on to the next generation, who had lived through the collapse of the Soviet Union in their adulthood (Fadeev, 2021; Pokida & Zybunovskaia, 2017; Toschenko, 2020). The latter, however, were not ready to fundamentally change the established memorial patterns. What happened could be described by using M. Hirsch's terminology the following way: post-memory fills the void left by memory, with descendants of the victorious generation, including younger generations, children, grandchildren, and great-grandchildren, transmitting heroic memorial patterns rather than directly remembering them (Hirsch, 2012, p. 5).

In the mid-1990s, this trend was reflected in symbolic actions. On May 9, 1995, the first Victory Parade in modern Russian history was held on the Red Square to celebrate the 50th anniversary of the end of the Great Patriotic War. Later that month, on May 19, the Federal Law No. 80-FZ *Ob uvekovechenii Pobedy sovetskogo naroda v Velikoi Otechestvennoi voine 1941–1945 godov* [On the Perpetuation of the Victory of the Soviet People in the Great Patriotic War of 1941–1945] was adopted. This law mandates that annual military parades featuring weapons, military equipment, and replicas of the Victory Banner should be held in Moscow, Hero Cities,¹ and in cities with the headquarters of military districts, fleets, combined arms armies, and the Caspian Flotilla (*Ob uvekovechenii Pobedy*, 1995). In the 2000s, the authorities gradually came to realize that collective memory of the Great Patriotic War is the main cohesive and identifying factor of Russian society (Dorogie veterany, 2010; Kangaspuro, 2011; Kopusov, 2011; Priem ot imeni Prezidenta Rossii, 2010; Vystuplenie na prieme, 2003; Vystuplenie na Voennom parade, 2005), which necessitated the creation of the for the legal framework to shield the main historical narrative from outside and inside influences.

Starting from the late 2000s, the Russian government gradually shifted towards more active involvement in “memorial wars” (Golovashina, 2021). This trend received a new boost in 2014 due to a number of factors. From the perspective of the foreign policy, the imposition of sanctions following the events in Ukraine triggered a sharp rise in patriotic sentiments (ardorman, 2015; Patriotizm i grazhdanstvo, 2014) known as the “Crimean consensus” (Akopov, 2019; Byzov, 2015; Harichev et al., 2022; Schwartzbaum, 2019). In this context, certain ways of recalling the memory of the Great Patriotic War in the media appeared particularly provocative. For example, there was significant public outcry over a poll conducted by the Russian TV channel *Dozhd*² [Rain] (recognized as a foreign agent), asking whether “Leningrad should have been surrendered to save hundreds of thousands of lives” (Prokuratura nachala proverku, 2014; Trans. by Ekaterina Purgina—E. P.).

The first memorial law in Russia was promptly adopted in the same 2014, even though Irina Yarovaya’s proposal (she was among the 40 names behind this project) was criticized for its “legal vagueness” (Runkevich, 2014). The law provided a fine of 300,000 rubles or one year of correctional labor for “disseminating information that expresses blatant disrespect for society about days of military glory and memorial dates of Russia related to the defense of the Motherland, as well as desecration of Russia’s military glory symbols, committed publicly,” as well as denial of the decisions of the Nuremberg Tribunal and dissemination of “knowingly false” information about the activities of the USSR during the Second World War (O vnesenii izmenenii, 2014; Trans. by E. P.). Moreover, the law implied punishment not only for “inappropriate” interpretations of events from 1941–1945 but also for comments “showing disrespect towards society” (O vnesenii izmenenii, 2014; Trans. by E. P.) regarding such events

¹ These are cities awarded the honorary title “Hero City” (gorod-geroi) in recognition of their outstanding performance during World War II.

² По решению Роскомнадзора, телеканал «Дождь» полностью заблокирован в России как средство массовой информации, выполняющее функции иностранного агента.

as the Battle on the Ice, the Battle of Poltava, or the Battle of Borodino. However, so far such cases have remained rare in legal practice (Sudebnyi departament, n.d.).

Several events in May 2020 led to a new phase in the development of memorial legislation: first of all, due to the pandemic restrictions on mass gatherings, most events celebrating May 9th were held online, including the most popular event of the Victory Day, the Immortal Regiment march³. Instead of participating in the march through the streets of their hometown with a portrait of a relative who was a veteran of the Great Patriotic War, a home front worker, etc., participants were invited to upload these portraits to the appropriate website. However, some portraits that people uploaded or attempted to upload did not meet the movement's requirements (Ustav Polka, n.d.) as they could offend the feelings of veterans and other participants in the event. In the second half of 2020 and the beginning of 2021, regional courts heard cases regarding the posting of portraits of Third Reich leaders (A. Hitler, H. Müller) and other images on the Immortal Regiment website that did not comply with the requirements of this public movement. On September 1, 2020, a court sentenced Perm resident Daniil Simanov to 200 hours of compulsory labor for posting a photograph of A. Vlasov (a Soviet officer who defected to Nazi Germany) on the Immortal Regiment website (Svizeva, 2020). In Ulyanovsk, the regional court fined local resident Viacheslav Kruglov 120,000 rubles for attempting to upload a photo of Hitler to the same website (Sazonov et al., 2020). Later, on May 28, 2021, the Voronezh court sentenced local resident Aleksandr Khoroshiltsev for posting a portrait of Hitler in 2020 to a fine of 90,000 rubles (Tolmachev, 2021). In May 2020 alone, more than ten people across Russia became suspects in committing the crime. Even though instances of Nazi symbols being displayed on May 9th had happened before, in 2020 these incidents gained more attention, as they were directly linked to the Immortal Regiment march. They became the focus of both law enforcement and researchers, who saw them as an example of the state's tightening control over memory politics, not just institutionally but also in terms of norms.

After photographs of Nazi criminals appeared on the Immortal Regiment website, on May 27, 2020, two bills were introduced into the State Duma by Alexey Zhuravlev, a deputy from the Liberal Democratic Party. Unlike the law adopted in 2014, these proposals were aimed specifically at protecting the image of the Great Patriotic War. Although Zhuravlev's initiatives did not receive support from the parliament, deputies made amendments to the existing law toughening the penalties (*O vnesenii izmenenii v stat'iu*, 2021). If we compare the provisions of Article 354.1 of the Criminal Code in its original formulation introduced by Federal Law No. 128-FZ of May 5, 2014 (*O vnesenii izmenenii v otchel'nye*, 2014), and the amendments introduced by Federal Law No. 59-FZ of April 5, 2021 (*O vnesenii izmenenii v stat'iu*, 2021), the following significant differences can be observed:

³ The Immortal Regiment is a nationwide movement in Russia commemorating participants in the Great Patriotic War. Since 2011, commemoration has been held in the form of marches in major cities across Russia and around the world every May 9th during Victory Day celebration where people have carried portraits, usually of their relatives, who contributed to the victory.

1. Clause 1 is supplemented with the provision regarding punishment for false information spread about veterans of the Great Patriotic War. This could be seen as a law enforcement response to the legal proceedings involving Briansk blogger Sergey Maslov and Governor Alexander Bogomaz (Ukhvatov, 2020), as well as veteran I. S. Artemenko's lawsuit against Alexei Navalny ("Natsepili na nego eti medal", 2021).
2. Clause 3 is supplemented with the formulation "insulting the memory of defenders of the Fatherland or humiliating the honor and dignity of a veteran of the Great Patriotic War" (Trans. by E. P.), which significantly expands the scope of the law, as the term "defenders of the Fatherland" includes not only participants of the Great Patriotic War but also of other armed conflicts in Russian history.
3. The general characteristic is a significant toughening of punishment both in terms of monetary fines (up to 5 million rubles compared to previously 500 thousand rubles) and in terms of imprisonment, which now applies not only to the denial of facts established by the Nuremberg Tribunal but also to insulting the memory of defenders of the Fatherland.

Order of Time and Boundaries of Publicity

In the introductory chapter "Orders of Time and Regimes of Historicity," François Hartog introduces the concept "regimes of historicity," which he describes as a way of harmonizing the past, present, and future to establish a structured "order of time" (Hartog, 2008). Special attention is drawn to the compulsory nature of these temporal orders, which demand compliance from individuals irrespective of their personal preferences. Whether we are talking about a financial broker monitoring stock price dynamics or a successful manager needing to meet deadlines, modern people find themselves engaged in various temporal frameworks: they need to coordinate the operating hours of childcare/school with their own working hours, consider peak hours when planning business and personal meetings, the leisure time practices of their partners and clients, and so forth. However, social order also implies the structuring of time. One way of time structuring is through the use of images of the past as a political resource. In other words, the inclusion of events interpreted in a certain way into an established historical narrative becomes the basis of political discourse and the understanding of reality. Hartog (2008) emphasizes that the regime of historicity itself is not history, but the reproduction of history, or rather, its construction in accordance with certain conditions that make one historical narrative possible and another impossible.

Despite the prevailing "distrust of the metanarratives" (Lyotard, 1984) among intellectuals (Detmer, 2003; Rorty, 1989) and criticism of historical knowledge, the recourse to the past remains a common way of shaping an "imagined community" (Anderson, 1991). It was easier to synchronize these "orders of time" in the era of "print capitalism" (Anderson, 1991) due to the small number of media outlets and the state's monopolistic influence over content transmission. At later stages, with the proliferation of diverse media on the Internet, the significance of the state has dwindled, now comparable to that of a popular blogger. However, unlike bloggers and scholars, the state has resources, including memory policy and memorial legislation, that enable it to

coordinate the “orders of time” of citizens. Therefore, memorial laws aim to safeguard the constructed image of the past, ensuring the transmission of the desired “order of time” and, consequently, enhancing social stability and unity in society. It should be noted that whether actions occur offline or online is irrelevant for regulatory purposes in this context.

The charter of the Immortal Regiment (Paragraph 2) specifies who is eligible to be depicted in procession photographs, including veterans of the army and navy, partisans, underground fighters, members of the Resistance, laborers of home front, prisoners of concentration camps, Leningrad siege survivors, and children of war (Ustav Polka, n.d.). Incidents involving the use of photographs or portraits that do not formally fit these criteria had occurred before 2020 (Obukhov, 2016), but they tended to be more a subject of public discussion rather than a reason for state intervention; furthermore, there have been no recorded cases of participants in the Immortal Regiment march carrying portraits of Hitler or General Vlasov. In 2020, on the movement’s website, there were recorded several attempts to upload portraits that did not meet the criteria (that year, the March was replaced by an online platform for the first time). These included portraits of political leaders of the Third Reich (Hitler, Müller) and members of the Russian Liberation Army, which fought on the side of Nazi Germany, which lead to the initiation of a series of criminal cases. Most of the accused denied guilt (Bogdanov, 2022; Permiaka osudili, 2020; Starodubtsev & Treshchikova, 2021; Titov, 2020), stating they had no intention of rehabilitating Nazism and lacked malicious intent. However, in light of the motto of the Immortal Regiment, “Pomniu i gorzhus” [I remember and I am proud], authorities interpreted the posting or attempted posting of inappropriate portraits as taking pride in Nazi leaders or as attempts to put them on a par with Soviet heroes and thus as rehabilitation of Nazism. What mattered was not the intent but the potential consequences that the actions committed by the accused could bring about.

The text of the law emphasizes that actions for which a person can be punished are committed publicly, in other words, what is considered unlawful is not the thoughts, intentions, or beliefs of an individual, but rather their dissemination among a certain group of people. However, virtual space changes the boundaries of publicity and our understanding of it. “In broad terms, the public sphere is that part of life in which an individual interacts with other people” (Trufanova, 2021; Trans. by E. P.). Social theorists refer to the “public sphere” (Habermas, 1962/1989) or “public space” (Arendt, 1958) as a significant characteristic of human society, a form of public reflection. The development of the Internet has been viewed by many researchers as a means to overcome the deficit of publicity and strengthen the role of the public sphere, whose autonomy gradually declined in the era of radio and television (Kosorukov, 2019). However, this publicity has certain risks associated with the vulnerability of the individual in the public arena, the need to protect personal data, and so on (Galloway, 2017; Morozov, 2011). Even though discussions about the increasingly complex relationships between the Internet, the state, and civil society have been ongoing for quite some time (Bächtiger et al., 2017; Fraenkel-Haerberle et al., 2015; Trettel, 2015), the theoretical and methodological justification for the normative regulation of actions performed online is currently limited to individual cases. According to Babkin (2003),

there is no need to develop new principles of legal regulation of Internet relations. These relations need to be "localized," integrated into the existing legal system and considered within its framework, usually through the disclosure of certain concepts in legislation ... as well as the necessary modification and adjustment of the provisions of existing laws. (Babkin, 2003, p. 23; Trans. by E. P.)

It can be assumed that contemporary normative regulation is proceeding along this path, but there may be problems with interpreting "publicity" in each specific case.

In this regard, the case of Viacheslav Kruglov, a 22-year-old resident of Ulyanovsk, is worthy of special interest. On May 4, 2020, Kruglov (previously convicted of extremism and theft of building materials), attempted to post an image of Hitler through his social media account on the Immortal Regiment online platform. However, the photos of Hitler did not appear on the website as they did not pass moderation. In other words, Kruglov was effectively convicted for an intention that became known thanks to the Internet as his action (sending a picture of Hitler) did not achieve the goal, which was publication of Hitler's picture on the website of the Immortal Regiment movement (Foks, 2021).

Another factor is related to the interpretation of the concept of publicity in relation to the law under consideration. The Supreme Court of the Russian Federation considered the crime defined by Part 1 of Article 354.1 of the Criminal Code, for which Kruglov was convicted, and decided that the crime in this case "is formal, whereby it is considered completed from the moment of committing actions constituting the objective side, regardless of the consequences" (Foks, 2021; Trans. by E. P.).

Proceeding from the formality of this crime, the Supreme Court explains in its ruling, the fact that Kruglov had already expressed his attitude, subsequent blocking of the applications he submitted, preventing the demonstration of photo images of Hitler for public access cannot affect the qualification of actions as a completed crime, nor does the number of persons to whom these applications were available. (Foks, 2021; Trans. by E. P.).

The term "publicity" thus implies that there are certain spectators who can react in a certain way to the actions of the accused. For example, a veteran who sees a photograph of Hitler in the demonstration of participants on the Immortal Regiment's website will likely experience negative emotions, and that is why most of the defendants under Article 354.1 publicly apologized to veterans. Despite the fact that from a legal standpoint, the online and offline practices of the Immortal Regiment are considered equivalent, the effect it has on participants, whether they are actually marching or scrolling through a feed of photos on their smartphone or computer, cannot be compared. This can be explained by the importance of the performative bodily practices, which are only possible offline, as well as the almost religious exhilaration gained by participants from the sense of solidarity and unity with other marchers (Arkhipova et al., 2017). However, in law enforcement practice, there arises a peculiar situation that can be described as "presumption of publicity," where any action in the online space is initially regarded as having an audience, regardless of whether the presence of this audience can be confirmed or not.

It should be noted that Article 354.1 previously applied to crimes committed on the Internet. For the first time, it was used in the well-known case of Vladimir Luzgin, who was fined for sharing an article on his VK⁴ page about the beginning of the Second World War. Vladimir Luzgin refused to pay the fine and sought political asylum in the Czech Republic (Strugov, 2016). In some cases, people were also found guilty for posting photographs of Wehrmacht soldiers or images of Russian officials in Nazi uniforms on their personal open to other registered users, for example, on VK (Sudebnyi departament, n.d.). The law is applied similarly to online and offline crimes, such as defacing monuments of military honor with a swastika or desecrating the Victory Banner.

Social media and other online sources provide valuable insight into the views of the accused, supplementing traditional witness testimonies in legal proceedings. The algorithms used by VK enable the keyword-based tracking of user page content.

Moreover, many defendants had been under the scrutiny of law enforcement prior to their alleged crimes due to their opposing views, as exemplified in the case of Vladimir Luzgin mentioned above. Law enforcement does not distinguish between an audience witnessing an act of “rehabilitation of Nazism” online or on personal pages, open to other registered users, and actions witnessed by just one or two people, nor does it consider the potential impact of these actions.

Judging by the current law enforcement practice in Russia (Sudebnyi departament, n.d.), publicity is interpreted in an expansive manner. Importantly, this interpretation is connected not only with the Article 354.1 “O reabilitatsii natsizma” [On the Rehabilitation of Nazism] of the Federal Law No. 59-FZ, but also with other norms (Naumov, 2002; Tkhabisimova & Kamilov, 2021). By the expansive interpretation of publicity, I mean the idea that any action performed online can be considered public, regardless of the intended recipient of that action. One might assume that the priority becomes not the audience itself, let alone the number of people who could assess the outcome of that action, but rather the “subjectively assumed meaning” as described by M. Weber (1991). In other words, the intention of the actor may be more important than the actual outcome of the action. Therefore, it should be understood that any statements made in virtual space immediately acquire much greater legal significance.

Legal Realities in Virtual Settings

The expansion of the state and law enforcement agencies seeking to control the sphere of the Internet can be traced back to the mid-2000s. For example, in the United States, one of the first high-profile cases was the FBI’s criminal prosecution of the creators of the game *Second Life* in 2007 for operating illegal casinos (Trukhanov, 2007). Despite the fact that the discussion centered on virtual casinos, which were part of the *Second Life* gaming world, the FBI proposed extending existing legislation to the gaming realm because the money that could be won or lost in casinos in *Second Life*’s space was exchanged for dollars at a certain rate. This case did not reach a conclusion, as the

⁴ VK (short for its original name VKontakte) is a Russian online social media and social networking service. <https://vk.com> VK™ is a trademark of VK.com Ltd.

creators of Second Life decided to abandon the casinos on their territory; however, it served, like other trials dealing with the actions of players on this platform as a precedent (Cheng, 2007; Razvod za izmenu, 2008; Sud nad Second Life, 2007).

Similarly, courts in the Russian Federation have equated posting photos of Nazi leaders online with physically displaying such portraits in public processions, thus blurring the distinction between public expression and other virtual practices. So far, the law enforcement practice of memorial legislation has not addressed games; nevertheless, in light of recent regulations discussed above, prohibiting the rehabilitation of Nazism, a significant question arises: Can gamers choose characters in online games, such as representatives of Nazi Germany, without committing a crime? Law enforcement agencies find it relatively easy to identify real individuals who take on such roles in the game, as online games facilitate participant tracking, and streaming platforms allow for the identification of individuals willing to adopt a *virtual* Nazi persona.

Currently, the domains of gaming and entertainment fall outside the scope of Article 354.1, which is applied to the resources that have already acquired a sacred significance, such as the Immortal Regiment. This distinction, however, is not specified in the legal regulations, which may result in new precedents in the future. It is probable that this distinction is rooted in the unique significance that the Immortal Regiment holds within contemporary symbolic politics.

The amendments to the Russian Constitution adopted on July 3, 2020 imply the need to protect “historical truth” at the state level. Article 67.1 stipulates the following: “The Russian Federation honors the memory of the defenders of the Fatherland and ensures the protection of historical truth. Denigrating the significance of the people’s heroic actions in defending the Fatherland is not allowed” (Konstitutsiia Rossiiskoi Federatsii, 2020; Trans. by E. P.).

Historically, there has been a back-and-forth in the relationship between social theories and legal practices. Since Weber’s time, social theories were applied in legal contexts. The definition of social action proposed by Weber: “Action is social in so far as, by virtue of the subjective meaning attached to it by the acting individual (or individuals), it takes account of the behavior of others and is thereby oriented in its course” (Weber, 1991, p. 7) is something for which the actor can be held responsible. Examples include the influence of Hugh Everett’s theory of multiple worlds on the M’Naghten Rule, legal precedents influenced by Erving Goffman’s frame analysis, or the theory of events, where legal precedents become the main cases for interpretation (Goffman, 1974; Thom, 1972/2002). However, nowadays, it is more common to see legal practices being analyzed through the lens of social theory (Kuznetsov & Rudenko, 2021; Law & Mol, 2002; Shtorn, 2018). For example, it is possible to analyze the concept of “historical truth,” found in the Russian Constitution and discussed in the above-mentioned cases of Nazi photographs being posted on the Immortal Regiment website, not only in relation to the development of historical discourse but also in relation to new political priorities and interpretations of significant markers of the past. While in the 2000s regulatory acts primarily focused on enforcing rules about public statements regarding the Great Patriotic War, recent years have shown subtle yet significant changes as regulations have started to tighten.

Starting from 2020–2021, there has been a noticeable trend of Article 354.1 being extended not only to the memory of the Great Patriotic War, but also to public representations of other episodes of national history that had previously not received close attention from law enforcement agencies. The most illustrative case is that of historian Sergei Chernyshov, the director of a college in Novosibirsk, who on August 17, 2021, published a Facebook⁵ post titled *On the Ghosts of the Past*, in which he compared Alexander Nevsky to a collaborator, after which he was summoned to the regional branch of the Investigative Committee (Nikolaev et al., 2021). However, law enforcement agencies continue to primarily focus on crimes related to the representations potentially discrediting the Great Patriotic War.

The grounds for this reaction were provided by the addition made in 2021 to Article 354.1, which now included the phrase “insulting the memory of defenders of the Fatherland” (Trans. by E. P.), a provision that directly applied to the remarks made by the historian from Novosibirsk. Such a formulation creates semantic ambiguity, thereby narrowing the very possibility of discussing specific historical events, as any doubt about the heroic behavior of defenders of the Fatherland or denial (even based on historical sources, documents) of such behavior can already be regarded as an insult, even if the statement is presented in a scholarly text.

A defining feature of contemporary memory politics in Russia is the desire to concentrate on a narrow set of themes that showcase a positive image of the past (Ivanov, 2020; Syrov, 2020). For a long time, such a theme was solely the Great Patriotic War. However, the examples discussed above not only indicate a tendency towards monopolizing the right to “historical truth” in the virtual space but also suggest the potential expansion of historical themes, which will constitute the sacralized core of state-oriented historical memory.

Thus, several important trends in the normative regulation of memory politics in the online sphere can be identified in Russia:

Firstly, technological advancements have led to a significant portion of the population relying on the virtual space as their primary source of information, shaping their worldview and political beliefs. In 2020–2021, an increasingly significant role was played by not only social networks but also messaging apps, which are gaining popularity among young people and effectively complementing traditional socialization institutions. The government’s increased focus on this area has been driven by the COVID-19 pandemic, which has diminished the political impact of traditional memory-related events like parades, processions, and the Immortal Regiment.

Secondly, from a methodological standpoint, it is important to consider the transformation of the concept of “publicity” in legal discourse regarding actions taken in virtual spaces. The evidence of publicness is by default understood not as a reliably confirmed number of direct or indirect responses to the action taken, but rather as the mere fact of the action itself. Moreover, the capacity to record nearly any user activity online significantly aids law enforcement agencies in gathering evidence,

⁵ Facebook™ is a trademark of Facebook Inc., registered in the U.S. and other countries. По решению Роскомнадзора, социальная сеть Facebook в России признана экстремистской организацией и заблокирована.

a process often accompanied by lengthy and sometimes unproductive procedures in the physical world.

Thirdly, an important trend in recent years is the broadening interpretation of Article 354.1 in law enforcement practice. While previously the focus was mainly on the Great Patriotic War, now situations arise where law enforcement activities turn to other historical periods, especially those symbolically significant to modern memory politics in Russia, like the figure of Alexander Nevsky.

As the state tightens regulations, there is also a noticeable increase in the stringent enforcement practices of law enforcement agencies, particularly in activities related to memory politics in the online sphere. The coronavirus pandemic marked a significant shift in this trend, as it weakened traditional ways of maintaining symbolic politics in Russian society. This led the state to focus more on the online space and create a corresponding regulatory framework. Even after the pandemic situation improved, memorial laws remained severe due to existing enforcement mechanisms. Furthermore, current trends in Russia's domestic and foreign policy show the state's determination to maintain and enhance its control over online platforms that shape collective identity.

Conclusion

Thus, memorial laws serve to protect the established understanding of historical events like the Holocaust (in Europe) and the Great Patriotic War (in Russia) while also endorsing specific political ideologies and values. Memorial laws often have a distinctly political orientation. In European countries, they are aimed at safeguarding European values, including the recognition of the Holocaust, in other words, this legislation has a supra-state character, and its emergence was the result of public discourse. In Russia, memorial laws are tied to the formation of state consciousness based on the history of the Great Patriotic War and the main actor in memorial legislation is the state, which distinguishes Russia's experience from that of Europe.

The idea of legal regulation of historical memory rouses vigorous controversy (Campbell, 2013; Kopusov, 2011; Korobitsyna, 2023; Nowak, 2015). As legal norms align with state memory policies, which evolve over time, this approach may conflict with established legal norms. The enactment of memorial laws can signal shifts in the perception or understanding of historical events. Consequently, the past transcends mere facts to become a potent resource for shaping social consciousness. The memory industry strategically employs history to legitimize political regimes, while laws govern the utilization of historical images as tools.

Special attention in defining the historical truth is given to the state's military history, which is directly linked to conflicting political viewpoints. The ways of protecting this truth are outlined in laws and legislative acts and can be analyzed by looking at the practical application of these laws.

As a result of technological changes, many people have come to rely on virtual space as the primary source of information and online media are now significantly shaping their worldview and political stance. The pandemic contributed to the state's

increased attention to the virtual sphere as the political effectiveness of traditional performative practices in memory politics, e.g., parades, marches, Immortal Regiment, has been reduced. However, the shift to online events and the legal issues they raised have prompted a reevaluation of certain regulatory measures. From a theoretical-methodological standpoint, the transformation of the concept of “publicity” in legal discourse regarding actions performed in virtual space is quite intriguing. Publicity is understood not as the reliably confirmed number of direct or indirect responses to the action but as the mere fact of its occurrence. Additionally, the ability to record practically any user action in cyberspace greatly facilitates the task of law enforcement agencies in forming evidential bases, which in real space is often accompanied by lengthy and not always productive procedures (to establish guilt unequivocally).

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ARTICLE

Others as Security Threats: Securitizing Discourses, Social Magic, and the Bureaucratic Field

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ABSTRACT

For over 20 years, there has been an ongoing debate about what is primary in the process of securitization—discourses or practices. Traditional research on securitization tends to analyze discourses and practices separately, which can be seen even in studies that attempt to combine these two approaches. In this context, the concept “discourses” refers to a wide range of public political statements, while the concept “practices” mainly refers to the strategies of security professionals. I argue that, in order to gain a better understanding of securitization processes, the research focus should be narrowed to first-order securitizing performatives and the related securitizing practices. This approach will highlight political statements that can genuinely alter social reality, bridge the gap between discourses and practices, facilitate the analysis of institutional mechanisms of securitization, and help obtain much new relevant empirical material. The potential benefits of the proposed approach are illustrated through the analysis of two cases: the Italian case and the Russian case. For the Italian case, the analysis includes declarations of states of emergency related to the exacerbation of the “nomad issue.” For the Russian case, it examines legal acts stipulating the official recognition of migrants as prone to terrorism.

KEYWORDS

securitization, Pierre Bourdieu, symbolic power, performative speech acts, securitizing practices

In the theory of securitization, two basic approaches are distinguished: the Copenhagen¹ and the Paris² approaches. Despite the assertion of Didier Bigo and Emma McCluskey that this division is rather conditional, greatly exaggerated, and tending toward essentialism (Bigo & McCluskey, 2018), it is evident that there is a certain tension between the adherents of these two schools, which is reflected in the works of the originators of these orientations³ and in the publications of young scholars⁴. The principal question in this discussion, which has been going on for more than 20 years, refers to which comes first in the process of securitization: discourses or practices? In the past, attempts have been made to reconcile the two orientations (for example, Bourbeau, 2014; Trombetta, 2014), although in empirical research the border between discourses and practices remains insurmountable⁵. The snag probably lies partly in the fact that discourses are usually understood as the public statements of political actors reflected in the media, social networks, policy statements, etc., while practices almost always refer to the routine activities of “security professionals.” As a result of these established traditions in the empirical research of securitization, there are few points of contact between discourses and practices. They “belong” to different actors, are implemented in different social fields, and follow different logics, which Bourbeau (2014) aptly characterizes as “the logic of exception” and “the logic of routine.”

However, this is just a part of the problem. Another bottleneck is associated with the understanding of the performative, the theoretical construct underlying the concept of securitization developed by the Copenhagen School. According to Ole Wæver (1995), securitization itself is a performative speech act, which, in fact, explains the priority of discourses over practices.

Disputes Over Performativity

Wæver’s focus on the performativity of securitizing speech acts has been repeatedly criticized. In particular, Thierry Balzacq, Holger Stritzel, and Matt McDonald have argued that performativity conflicts with the intersubjective nature of securitizing discourse also postulated by the Copenhagen School. To eliminate this contradiction, it has been proposed to abandon one of the postulates or at least to give preference to one or the other. Moreover, according to these authors, insistence on the performativity of a securitizing speech act obscures the importance of the influence of the historical and social context in which securitization unfolds (Balzacq, 2005; McDonald, 2008; Stritzel, 2007). While such criticism is fair to some extent, these difficulties seem to

¹ The best-known representatives of the Copenhagen School are Barry Buzan and Ole Wæver.

² The leading researcher of the Paris School is Didier Bigo. The Aberystwyth School is usually mentioned as well, but the main controversy is between the two approaches above.

³ In particular, Bigo (2002) writes that “authors like Buzan have little sense of the routines, the day-to-day practices, of the bureaucracies that are necessary to understand how discourses work in practice” (p. 73).

⁴ For example, Bourbeau (2014) notes ironically: “many graduate students cut their theoretical teeth on these debates” (p. 187).

⁵ Even in those works where an attempt is made to combine the analysis of discourses and practices (for example, Dimari, 2020; Karyotis, 2012).

arise not from the emphasis on the performativity of securitizing discourse, but from the specific interpretation of the performative that dominates in these debates.

Wæver himself has repeatedly pointed out that he relied on John Austin's theory of speech acts in developing the concept of securitization. It is from Austin's work (1962) that Wæver borrowed his examples of performative speech acts (naming a ship, apologizing, wedding ceremony) and the idea of "conditions of felicity" that must be met in order for a securitizing performative to be successful. On the other hand, Stritzel, in his criticism of the approach advocated by the Copenhagen School, argues that in addition to Austin, Wæver was influenced by the later concepts of Jacques Derrida and Judith Butler (Stritzel, 2007, p. 361). This perspective enables Stritzel to argue that the Copenhagen School overlooks the social context of securitization and focuses excessively on the semantic aspects of a speech act. Thus, the discussion occurs within the postmodern and poststructural linguistic paradigm, where, to paraphrase Derrida's famous expression, it is improper to look for anything beyond the text.

However, the theory of performativity is not limited to the works of Austin, Derrida, and Butler. Pierre Bourdieu's concept of the symbolic power of language resolved the issue of the performative's rootedness in social power relations long before Stritzel addressed it (Stritzel, 2007, p. 361). Bourdieu also explained the "magical effectiveness" of performative utterances, countering Balzacq's reservations (Balzacq, 2005, p. 177). Bourdieu's approach helps resolve most of the contradictions pointed out by critics of the Copenhagen School, without abandoning the concept of the performative that underlies their approach.

The Performative in Bourdieu's Interpretation

Analyzing the concept of the performative, Bourdieu rightly notes that "Austin's account of performative utterances cannot be restricted to the sphere of linguistics ... [I]locutionary acts ... are acts of an institution that cannot be sanctioned unless they have, in some way, the whole social order behind them" (Bourdieu, 1991, pp. 73–74). As a result, it makes no sense "to search ... in language for something that is actually inscribed in the social relations" (Bourdieu, 1991, p. 38).

Pointing out the falseness of the illusion of "linguistic communism" haunting linguistic theory, Bourdieu emphasizes that language is socially heterogeneous. This is especially noticeable in the case of performative utterances, which always signify a pretension to transform the world with the help of words, i.e., using social magic. Such pretension only to a small extent depends on the grammatical correctness of the statement itself, and its insanity or rationality is mainly determined by the extent to which it is based on an objective (historically settled) social reality. A vivid illustration of this is a legal act that exerts its magical effect only when it is performed by a subject who has the right to do so, i.e., acting on behalf of a whole social group, which allows him to substitute action with speech.

The power of words, therefore, does not derive from the grammatical structure of language, but is based on the possession of a symbolic capital, that is, on the recognition, constituted or not, which agents receive from the group. In this context,

the contradiction between intersubjectivity and performativity is completely overcome, since the former is, in fact, recognized as a precondition of the latter.

Bourdieu also points out that the symbolic capital that performativity feeds on is not evenly distributed in society. Symbolic power is concentrated in the field of politics in the hands of a relatively small group of professionals with exclusive access to the tools of political production. Although non-professionals have some influence on the functioning of the political field, intraprofessional competition for the preservation or transformation of the social world by preserving or transforming the principles of its legitimate vision has a much greater impact on the development of the political process. At the same time, professionals do not act arbitrarily, being in turn limited by the current state of the political game, which is a product of the entire prior history of the political field.

Bourdieu's indication of the decisive importance, both in the field of politics and in society as a whole, of the historically embedded social structures and rules of the game, which limit the strategies of the actors who create performatives, resolves the problem of the dichotomy between performativity and socio-historical context, which in this interpretation turns out to be false. At the same time, Bourdieu's key thesis of the symbolic power underlying the creation of performatives highlights the fundamental connection between legitimate language and strategies aimed at the transformation of the social world.

The Paris School and Bourdieu's Theory

Despite its reliance on Bourdieu's concepts of social fields and habitus, the Paris School has largely ignored his understanding of the performative. Believing that Bourdieu exaggerated the significance of the political field as the "field of fields" (Balzacq et al., 2010, p. 3), adherents of the practice-oriented approach overlook one of Bourdieu's fundamental concepts, that is symbolic power. They argue that security professionals and their day-to-day practices play a central role in securitization processes, viewing the speech acts of political professionals as largely decorative and secondary to what is "actually" happening in the field of security. This perspective may hold some truth if we consider the established tradition of studying securitizing discourses, where a wide variety of political statements in the media are analyzed, many of which do not have a significant impact and are not performatives in the full sense of the word. However, this does not mean that national political professionals have lost their symbolic power or that they have fallen under the influence of transnational security professionals who monopolize specialized issues (Bigo, 2008). It simply means that the focus of research, influenced by the established scientific practice of discourse analysis, has shifted from first-order performatives to secondary political statements that, at best, have a weak and indirect impact on social reality.

First-Order Performatives: Legal Acts

Bourdieu (1991) calls the legal act the limiting case of the performative statement (p. 75). When adopted by an authorized person, such an act establishes a new principle of legitimate vision, thereby transforming the social world. It should be remembered

that legal acts are not only laws, but also bylaws encompassing a universe of general, local, departmental, regional, and other regulations that create hundreds of thousands of new institutional rules of the game, legalized meanings, visions, and links. These are truly magical speech acts, possessed by political professionals⁶ and the bureaucratic circle (which includes, but is not limited to, security professionals⁷), and they are of key importance in securitization processes. At the same time, securitizing legal acts are inextricably linked with routine securitization practices, being both a condition for them and a result of them. Being limited by the entire prior history of securitization—a complex of techniques, practices, discourses, and acts that recognize certain events, groups, and phenomena as dangerous—securitizing legal acts (re)create security threats and algorithms for securitizing practices and establish their circle of executors and the rules of interaction among them.

Surprisingly, legal acts usually remain outside the scope of studies of the Copenhagen School representatives, and at the same time, they often come into the focus of the Paris School followers. A good example is the work of Tugba Basaran, who states that the law is a fundamental tool “used to create legal borders and restrict the fundamental rights of particular populations” (Basaran, 2008, p. 340). Tracing the process of forming so-called “border zones,” where the usual norms of a liberal state do not apply, Basaran demonstrates how, by means of legal acts, a new social reality is created that does not correspond to “normal politics.” Relying on her analysis, the author argues that the logic of routine prevails in securitization processes, rather than the logic of exception, and illiberal security practices are in fact embedded in ordinary politics of a liberal state. Without dwelling in detail on this controversial idea⁸, it should be mentioned that the linguistic nature of legal acts remains unnoticed by Basaran, who considers them legal practices. As a result, the boundary between discourse and practices is erased, and the former just turn into a variety of the latter, which makes it impossible to observe how performatives work. This interpretation overlooks the crucial role of performative utterances by actors with significant symbolic capital in securitization processes, which Wæver rightly emphasizes. The processes of producing and reproducing such utterances also remain behind the scenes.

Without claiming any radical rethinking of securitization theory, I propose a shift in perspective regarding performative speech acts. Drawing from Bourdieu's insights, I suggest categorizing legal acts as first-order performatives and positioning them, along with related securitizing practices, in the center of research. This approach, first, will allow the focus to be placed on those speech acts that really have the ability to

⁶ In this case, these are, of course, the politicians who are members of executive and legislative bodies.

⁷ With the exception of those security professionals who are employed by non-state structures.

⁸ A decision about what to consider as an exception or routine depends largely on the author's perspective. On the one hand, the fact that exceptional border zones are created through the use of customary law can be considered as an argument that there is no radical gap in relation to “normal politics.” On the other hand, the exclusivity of border zone rules clearly indicates that they do not conform to what is perceived as “normal” in liberal states, i.e., they demonstrate a gap in relation to “normal politics.” This use of the law was well defined by Rebecca Sanders and Lisa M. Austin, who called it “plausible legality” and “lawful illegality,” respectively (Austin, 2014; Sanders, 2018).

change social reality⁹. Second, it will solve the problem of the gap between discourses and securitization practices by overcoming the established tradition of separate analysis of them. Third, it will enable the establishment of the main circle of actors implementing securitizing practices and empirical testing of the doubts of the validity of Paris School adherents' assertion of the dominant role of security professionals (for example, Bourbeau, 2014, p. 192; Buzan et al., 1998, pp. 31–32). Fourthly, it will shed light on the institutional mechanisms responsible for implementing securitization.

The thematic study of the two cases presented below, which are declarations of states of emergency due to the presence of nomadic communities in Italy and the official recognition of migrants as terrorist-prone in Russia, aims to illustrate the potential benefits of the proposed approach.

Empirical Basis of Research

The empirical basis of the case study comprises 221 documentary sources. For the Italian case, these are 17 national legal acts, two provincial security pacts, three regulations for managing nomad camps, a description of the “nomad plan” drawn up by the Delegated Commissioner in Lazio Province, two requests to the Ministry of the Interior for the reconstruction of La Barbuta nomad camp, a notification posted on the official website of Ciampino, a press release from the Delegated Commissioner in Lazio Province, a report by the Italian Red Cross, a transcript of a Senate meeting, and two court orders on the illegitimacy of the declaration of a state of emergency.

For the Russian case, the sources include eight federal legal acts including *Kompleksnyi plan protivodeistviia ideologii terrorizma v Rossiiskoi Federatsii* [Comprehensive Plans for Countering the Ideology of Terrorism] for 2013–2018 and 2019–2023, 140 regional and municipal legal acts from 55 constituent entities of the Russian Federation, and 42 reporting documents from 20 Russian regions.

Italian Case: “Emergenza Nomadi”

As has been highlighted in many studies, exacerbation of the nomad issue (or “Gypsies,” referring mostly to Roma and Sinti) is an integral part of the broader international migration problem (Colacicchi, 2008; Di Noia, 2016; Sigona, 2005). The most recent major waves of migration of Roma to Italy came in the 1960s (from the former Yugoslavia), the late 1990s (mainly from Kosovo), and the early 2000s (from Romania).

In the 1980s, “nomad camps”¹⁰ inhabited by Roma and Sinti appeared on the outskirts of many major Italian cities. Some settlements existed semi-legally, while others were governed by local administrations. The establishment of the camps was encouraged by Italian legislation aimed at protecting “nomadic culture” and obliging local authorities to erect temporary camps for the “nomadic population.” An

⁹ This proposal, of course, does not preclude the possibility of exploring other political discourses involved in the securitization process. The point is only that first-order performatives should be prioritized.

¹⁰ The first government-sanctioned nomad camps near cities began to appear in the 1970s (Picker, 2015).

unintended consequence of the categorization of Roma and Sinti as nomads was their de facto segregation in Italy (Picker, 2015; Sigona, 2005). The nomad camps themselves, several decades after their construction, began to be seen as one of the main problems of urban security (Picker, 2015, p. 78). The situation escalated in 2007 after the accession of Romania and Bulgaria to the EU, which raised concerns in Italy of a possible “invasion of migrants” from these countries, including Roma. Tensions increased amid vigorous media coverage of several crimes allegedly committed by Romanian Roma.

Following the decree of May 21, 2008 issued by Italian Prime Minister Silvio Berlusconi, a state of emergency “due to the presence of numerous non-registered and nomadic citizens” was declared in the territories of Lombardy, Lazio, and Campania¹¹. It was argued that the settlement of “nomads” in the regions mentioned had caused “serious social anxiety,” could have “severe consequences in terms of public order and the safety of the local population” and required urgent and exceptional measures, since the situation “could not be resolved through the tools offered by customary law” (President of the Council of Ministers, 2008; Trans. by Kseniya Grigor'eva—K. G.). Thus, here we are dealing with a classic securitizing performative where securitizing actors, by emphasizing the priority and urgency of the existential threat (in this case, the perceived threat to the well-being of the local population from nomadic communities), are excused from the usual rules and procedures that would otherwise restrict them.

The initiators of the decision included the Minister of the Interior, who submitted a request to the Council of Ministers a few days earlier asking it to take urgent “measures of an exceptional nature,” as well as the prefect of Milan and the mayor of Milan, who signed a security pact on March 18, 2007, in which, among other things, they pledged to formulate a proposal for the government to declare a state of emergency. Additionally, the preamble to the emergency decree referred to the 2007 pact for a safe Rome signed by the prefect of Rome, the president of Lazio region, the president of the province of Rome, and the mayor of Rome, where nomadic settlements were viewed as requiring increased control by law enforcement.

Looking back a little, an earlier precedent can be observed in which nomads were officially called a threat to public safety: in 2003, by a decree of the prime minister, a state of emergency was declared with respect to nomadic settlements in the municipality of Caivano. At that time, similar to the case under consideration, the initiative came “from the grassroots”—the prefect of Naples—and was supported by the Head of the Civil Defense Department under the Prime Minister. Although there are no earlier analogies in the databases of Italian national legislation, these securitizing legal acts are undoubtedly associated with a long history of official perception of “nomads,” “gypsies” and “vagrants” as troublemakers in Italy and in Europe in general¹².

¹¹ It should be noted that Italy presents a very fruitful case for the study of securitization: the government's use of declarations of states of emergency for a variety of reasons (including seismic and hydrogeological threats, environmental pollution, threats to public health, transport problems) is so widespread in the country that some analysts speak of the creation of a system of “parallel legislation” (Duilio, 2010, p. 3).

¹² For more detail, see Di Noia (2016).

The group of securitizing actors in 2008 (as, indeed, in 2003) had a mixed composition, including territorial governmental bodies (prefects), local, provincial, and regional political professionals (mayors, presidents of provinces and regions), and a security professional (the Minister of the Interior). Prefects can be considered security professionals because they report directly to the Ministry of the Interior and are responsible for public safety and civil defense. However, it is important to note that prefects are also the highest representatives of the Italian government in the provinces, performing significant civil administration functions. Therefore, prefects should be seen not as “pure” security professionals but as multidisciplinary professionals who combine security duties with ongoing civil administration responsibilities.

The securitizing moves were addressed to the Council of Ministers, which originally served as the audience. Its agreement with the proposed vision led to the issuance of a state of emergency decree. However, it is too early to draw the line at this point, since the securitization process does not end here, but only moves into a new, more active phase. At the same time, the role of the Council of Ministers changes from that of audience to that of the main securitizing actor, thereby causing an intensified dynamic of securitization, now manifesting itself at the highest state level.

In light of the above, several important points should be considered. First, only a limited number of actors from the political-bureaucratic field, possessing sufficient symbolic capital to make their arguments heard, had access to the production of performative utterances. Second, the analyzed performative did not emerge spontaneously; it was firmly rooted in the socio-historical context, previous first-order performatives, and a long-standing habit of viewing gypsies as a “security threat.” From this perspective, it merely reinforced the existing vision rather than created it anew. Third, despite this, the securitizing performative marked a significant shift from previous policies toward gypsies. It officially excluded this group from other population categories, establishing a new emergency regime that allowed for previously inadmissible measures, such as forced relocation to zones under increased surveillance, reminiscent of the monitoring of criminals, and mass expulsion from the country.

Reproduction of Securitizing Performative in a Self-Referential System of Legal Acts

A characteristic feature of an in-force legal act is its ability to generate derivative legal acts, which, in turn, generate other derivative legal acts, and so on, as long as the primary legal act remains in force and relevant. If we focus just on the tip of the iceberg, the national legal acts generated by the 2008 state of emergency decree, we find that ten derivative acts were adopted by the Italian Council of Ministers between 2008 and 2010. This process is visualized in Figure 1.

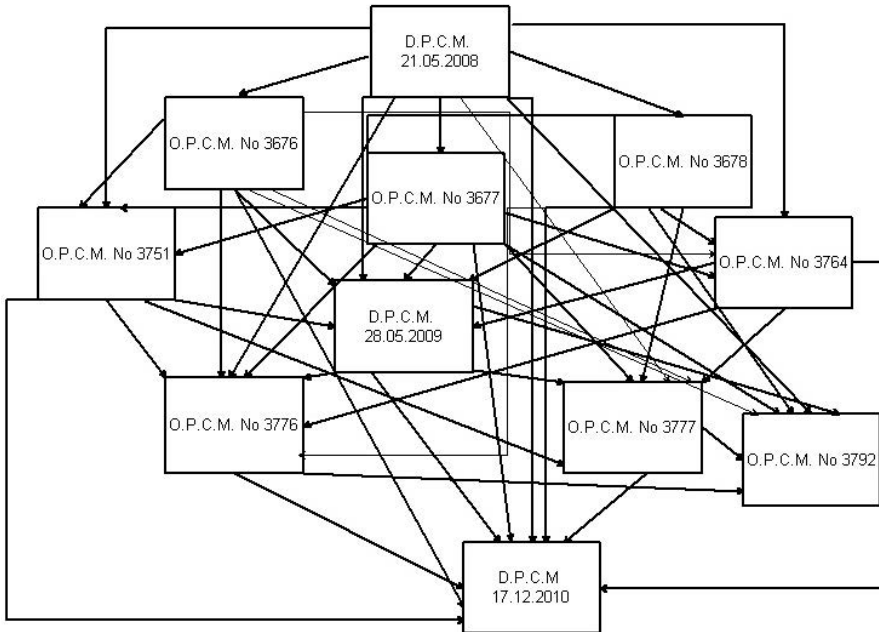
Further development of lawmaking in this case was interrupted by a decision of the Council of State¹³, dated November 16, 2011, which recognized the initial state of emergency decree as illegal (Il Consiglio di Stato, 2011).

Each of the derivative legal acts shown in Figure 1 includes a performative targeting nomadic communities as a threat and providing for measures to combat that

¹³ Supreme Administrative Court of Italy.

Figure 1

Acts Adopted by the Italian Council of Ministers Between 2008 and 2010



threat. Specifically, O.P.C.M.¹⁴ Nos. 3676, 3677, and 3678 delegate to the prefects of Rome, Milan, and Naples extraordinary powers to detect, identify, and monitor nomadic settlements, eliminate those that are not officially allowed, expel illegal nomads, place the remainder under increased supervision, and carry out integration measures aimed at reducing the danger they pose to public order and healthcare. O.P.C.M. Nos. 3751 and 3764 additionally expand the powers of prefects and the list of resources they can use in their activities (including the technical offices of municipalities, provinces, regions and other official institutions located in the respective territories). D.P.C.M.¹⁵, dated May 28, 2009, extends the state of emergency for another year, simultaneously extending it to Piedmont and Veneto (on the initiative of the Minister of the Interior and the prefects of Turin and Venice). O.P.C.M. Nos. 3776 and 3777 delegate to the prefects of Turin and Venice powers similar to those given to their counterparts in Rome, Milan and Naples. O.P.C.M. No. 3792 allows prefects to deviate from certain rules regarding public contracts for work and procurement (initiated by the prefect of Rome). Finally, D.P.C.M., dated December 17, 2010, extends the state of emergency until the end of 2011.

The magical power of these legal acts, therefore, lies in the transformation of nomads into a threat, of prefects into delegated commissioners who can change some generally accepted rules at their own discretion, and of the employees of official institutions located in the five provinces affected by the state of emergency into

¹⁴ L'ordinanza del Presidente del Consiglio dei ministri [Order of the President of the Council of Ministers].

¹⁵ Il decreto del Presidente del Consiglio dei ministri [Decree of the President of the Council of Ministers].

subordinate delegated commissioners. Additionally, these acts contain approximate scenarios for commissioners to play their roles and a short list of the executors of securitizing practices. In addition to the prefects of Milan, Rome, Naples, Turin, and Venice themselves, this list includes regional and municipal authorities, employees of public organizations (including civilian and military personnel), consultants selected from among public lawyers or administrative magistrates, local heads of the state police, the Italian Red Cross, and, if necessary, the prefects of neighboring provinces.

Clarification of the List of Executors and Securitizing Activities at the Regional and Municipal Levels

National securitizing performatives are deliberately abstract, providing a general framework for the game. They leave the prefects who have been made commissioners much room for maneuver. Endowed with, among other things, the ability to issue their own securitizing performatives in their jurisdictions, the commissioners concretize the lists of executors and create new, detailed scenarios for them.

Thus, the Regulation for the Management of Settlements for Nomadic Communities of Lazio Region, approved by the Delegated Commissioner of Lazio, contains a long list of executors of securitizing activities, including the heads of municipalities; the directors of departments of social, education, and school policies; local health officials; departments for the coordination of security policies; local fire brigades; the state police; the carabinieri; and even these same nomadic communities, which, according to the scenario, should contribute to the expulsion of some of their members and promote increased supervision over themselves (Il commissario delegato, 2009a).

Simultaneously, the “nomad plan,” devised by the commissioner of Lazio with support from the mayor of Rome and the advisor for social policies, involves participation in securitizing activities from various stakeholders. These include the police, construction companies, the archaeological heritage administration, which verifies the absence of protected artifacts, departments of social policies, education and school policies, local health departments, regional agencies for environmental protection, and the Italian Red Cross (Piano nomadi, 2009).

Each of these executors is charged with one or another securitizing function: from various forms of control over the inhabitants of nomadic camps, to the expulsion of some of them and the elimination of some settlements, the clearing of the resulting debris, the beautification of the territories, and the building of new camps in other locations.

Securitizing Practices

Unfortunately, in the Italian case, I was able to find only two detailed reporting documents that could be used to assess the conformity of the actual securitizing practices described in the above scenarios: a transcript of hearings of the Delegated Commissioner of Lazio province in the Senate (Senato della Repubblica, 2010) and a report from the Italian Red Cross (Croce Rossa Italiana, 2010). Nevertheless, the destructive power of securitizing performatives is clearly visible even in these isolated examples, supplemented by information from other sources.

According to the report of the Delegated Commissioner in the province of Lazio, various entities actively participated in the implementation of the “nomad plan.” These included the police, the municipality, the archaeological heritage administration (which verified the absence of protected artifacts), authorities from the province of Rome and the Lazio region, construction companies, and the Italian Red Cross. In the course of plan implementation, a census of nomads was carried out, accompanied by photographs and the collection of fingerprints. The deportation of undocumented persons and the placement of the documented under special control ensued. “Numerous illegal camps were closed and liquidated”¹⁶, and measures were initiated to integrate the residents of the remaining settlements. The maximum allowed period of residence in camps, previously unlimited, was reduced to four years.

The involvement of the Red Cross in the securitizing activities, which is mentioned in the commissioner’s speech, is detailed in a report from the humanitarian organization. In particular, as stated in the introduction, the Italian Red Cross was tasked with conducting a census of the population living in illegal, tolerable, and permitted nomad camps in the Lazio region. Apart from the census itself, Italian Red Cross volunteers carried out reconnaissance missions to locate settlements, mapped their locations (using different colors to indicate the degree of legality), took photographs, and provided detailed descriptions of the settlements. All collected materials were then delivered to the prefecture. Additionally, the report describes the cooperation between the Red Cross and the International Agency for Social Services in Italy (SSI-AI), which aimed at expelling adult and juvenile nomads from the country (Croce Rossa Italiana, 2010).

Thus, the actual securitizing practices generally followed the scenarios outlined by the securitizing legal acts. It is important to note that these practices were not created *ex nihilo* by the securitizing performatives. Many of them, such as document verification, information collection, and the expulsion of undocumented gypsies, had existed previously. The new official vision simply recreated and intensified these practices within a changed political context. However, there were also several innovations, including mass censuses and fingerprinting (even of underage gypsies), enclosing nomad camps with barbed wire, and introducing stricter rules for staying in them. The main result of the securitizing performatives was the establishment of a new legalized exceptional regime for the entire Romani population living in the five regions under consideration.

The transformation of state and non-state organizations, officials and individuals into the executors of securitizing activities, as far as can be judged from the available sources, generally proceeded without complications. Active resistance actually took place only once, when the mayor of Ciampino, hoping to close a nomad camp located in his jurisdiction, took an openly oppositional position when it became clear that, according to the “nomad plan,” the camp was, on the contrary, slated for expansion. Other addressees of the securitizing performatives readily assumed their assigned

¹⁶ In total, four of the nine “tolerable” camps were ultimately closed and, according to assessments by the Italian Association on July 21, more than 400 small unauthorized camps had been closed (Associazione 21 luglio, 2012a), accompanied by the forced evictions of hundreds of people in distress (Amnesty International, 2011; Associazione 21 luglio, 2012b).

roles, as evidenced, in particular, by the commendations given by the delegated commissioner of the province of Lazio to the police, the Red Cross (Senato della Repubblica, 2010, p. 6), the management of the fire brigade, the department of public rescue and civil defense, and the municipality of Rome for their full availability and effective cooperation (Il Commissario Delegato, 2009b).

It should also be emphasized that the ability to produce first-order performatives was virtually monopolized by professionals in the political-bureaucratic field. The primary performative speech act, delivered by the President of the Council of Ministers, was the most powerful because it was backed by the full symbolic power of the state. This act had the most arbitrary character, reflecting the decision of the top leader, while the derivative performatives merely echoed it and created tools for implementing the new legal vision.

Although Silvio Berlusconi's decree would have remained mere words without the diligent work of the entire bureaucratic hierarchy, it is clear that the performative speech of the key political figure, symbolically representing the will of the Italian people, had a binding effect on all other actors involved in the securitization process, including security professionals. The difficulty in challenging this speech was also tied to the social order that supported it.

Desecuritization

Though relevant NGOs and individual Roma families immediately responded to the declaration of the state of emergency by filing lawsuits and complaints with courts, national and international organizations, they only managed to get it lifted after three years. During that period, significant damage was done to the gypsy communities. At the same time, the fact that Berlusconi's decree and the resulting securitizing legal acts eventually lost the status as a new legal vision—due to the Council of State and the Superior Court of Cassation declaring the state of emergency illegal—shows the fragility of social magic and the competitive nature of performative utterances.

Importantly, the struggle took place in a discursive arena. The trials became a battleground for the securitizing and desecuritizing performative speeches of the involved actors. On one side were the President of the Council of Ministers, the Head of the Civil Protection Department, the Minister of the Interior, the prefects of Rome, Milan, and Naples, the authorities of the Campania region, the provinces of Rome and Naples, the cities of Rome, Milan, and Naples, the regions of Lazio and Lombardy, and the leaders of the Red Cross, all represented by authorized lawyers. On the other side was the European Roma and Roma Families Rights Center, symbolically representing the interests of the entire Romani population.

The main arguments of those opposing securitization were that it was unreasonable to impose the state of emergency, the measures taken were inconsistent with normal political rules, and officials deliberately misapplied Italian laws. Meanwhile, those supporting securitization pointed out formal procedural errors made by their opponents.

The audiences for the unfolding events were represented by judicial panels, which also authored the first-order performatives based on the outcomes of the legal battles. Despite their weaker social position compared to their opponents, the plaintiffs

succeeded with the support of various courts that found their arguments more convincing than those of the defendants. Empowered to issue performative verdicts that took precedence over the performative utterances of the executive authorities, the courts dismantled the symbolic power of Berlusconi's decree and its derivative legal acts, rendering them an illegitimate set of words with no further social effect.

The Russian Case: Migrants as Persons Prone to the Ideology of Terrorism

The idea that migration poses a security threat came to Russia somewhat later than to the Western countries. While the politicization of migration in the USA and Europe is usually attributed to the 1970s (for example, Huysmans, 2000; Karyotis, 2007), and sometimes to an earlier period (Rudolph, 2003), this process became noticeable in Russia only in the second half of the 1990s¹⁷. The increase in terrorist attacks in the 1990s, due to heightened political instability following the collapse of the Soviet Union and the armed conflict in the Chechen Republic, was quickly linked to migration. This included both internal migration from the republics of the North Caucasus and external migration from the countries of the Caucasus, Central Asia, and other predominantly Muslim regions. Currently, there are several hundred securitizing legal acts in publicly accessible Russian legal databases¹⁸ that target migrants as a source of terrorist threat.

As far as can be judged from these documents, similarly to the Italian case, Russian securitizing performatives were originally created at the local and regional levels (by regional, municipal, and local authorities). The federal center took a decisive turn towards the securitization of migration only in the early 2000s, which was expressed, in particular, by the subordination of the Federal Migration Service to the Ministry of Internal Affairs in 2002¹⁹ and the adoption in 2003 of *Kontseptsiiia regulirovaniia migratsionnykh protsessov v Rossiiskoi Federatsii* [Concept for the Regulation of Migration Processes in Russian Federation], which directly linked migration with the deterioration of the crime situation (Ob odobrenii Kontseptsii, 2003). As time went on, the trend continued to strengthen.

On December 28, 2018, the President of the Russian Federation approved *Kompleksnyi plan protivodeistviia ideologii terrorizma v Rossiiskoi Federatsii* [Comprehensive Plan for Countering the Ideology of Terrorism in the Russian Federation] for 2019–2023, where foreign citizens arriving in Russia from countries with increased terrorist activities²⁰ were named persons susceptible to the ideology of terrorism, as

¹⁷ This is due to the fact that the USSR was, in fact, closed to mass international migration. The first waves of migration after the collapse of the Soviet Union consisted of Russian-speaking repatriates warmly received by the new Russian government, whose initial migration policy was more than generous by all international standards. See Light (2017), Mukomel (2005).

¹⁸ It can be assumed that a significant fraction of such orders is issued for internal use.

¹⁹ This process came to its logical conclusion in 2016, when the Federal Migration Service was abolished and its functions were transferred to the Ministry of Internal Affairs.

²⁰ The list of these countries must be provided annually by the staff of the National Anti-Terrorism Committee and is not available to the public. However, most of the analyzed documents mentioning countries with increased terrorist activity referred to the Central Asian states. Additionally, references were made to countries such as Syria, Turkey, Afghanistan, Iran, Iraq, Pakistan, and Libya.

well as falling under its influence (Kompleksnyi plan protivodeistviia, 2018, p. 4) This categorization was consistent with the previous Comprehensive Plan for Countering the Ideology of Terrorism for 2013–2018 (Kompleksnyi plan protivodeistviia, 2013). Although migrants are not directly assigned to the category in the basic text of this document, foreign students (clause 7.1.) and labor migrants from Muslim countries (clause 7.3.) are mentioned in Appendix 2, which contains a list of the data required for the report, in the section dedicated to the number of events involving citizens most susceptible to the ideology of terrorism (Kompleksnyi plan protivodeistviia, 2013).

It is important to mention that both Comprehensive Plans were prepared in an official bureaucratic style, did not contain a declaration of the state of emergency, referred to current Russian legislation (including the Constitution of the Russian Federation), and did not announce any exceptional measures, i.e., they imitated an ordinary legal act conforming to the rules of normal politics. Given this, one could conclude that the logic of routine rather than the logic of exception was applied here. In reality, however, this case is a good example of a well-veiled gap in relation to normal politics (lawful illegality or plausible legality). The categorization of migrants from certain countries as persons susceptible to the ideology of terrorism and therefore deserving special treatment is obviously discriminatory, and discrimination based on nationality is prohibited by Russian legislation, including Article 19 of the Constitution. As a consequence, the claim that the Constitution serves as the basis for developing and implementing the Comprehensive Plan for Countering the Ideology of Terrorism is misleading. The Plan itself violates existing legal norms, representing a break from normal politics rather than its continuation. Comprehensive plans were developed under the auspices of the National Anti-Terrorism Committee (NAC). According to its chairman, the Ministry of Science and Higher Education, Ministry of Education, Ministry of Culture, Ministry for Digital Development, Communications and Mass Media, Roskomnadzor [Federal Service for Supervision of Communications, Information Technology, and Mass Media], Rosmolodezh [Federal Agency for Youth Affairs] and other departments took an active part in this work (Direktor FSB, 2021).

Thus, the securitizing performative was (re)produced at the national level following the emergence of similar securitizing performatives at the local and regional levels, mirroring the process in Italy. The group of creators of the national securitizing performative was quite diverse. In the Russian case, it consisted mainly of bureaucratic professionals, specializing in security issues and also in areas unrelated to security.

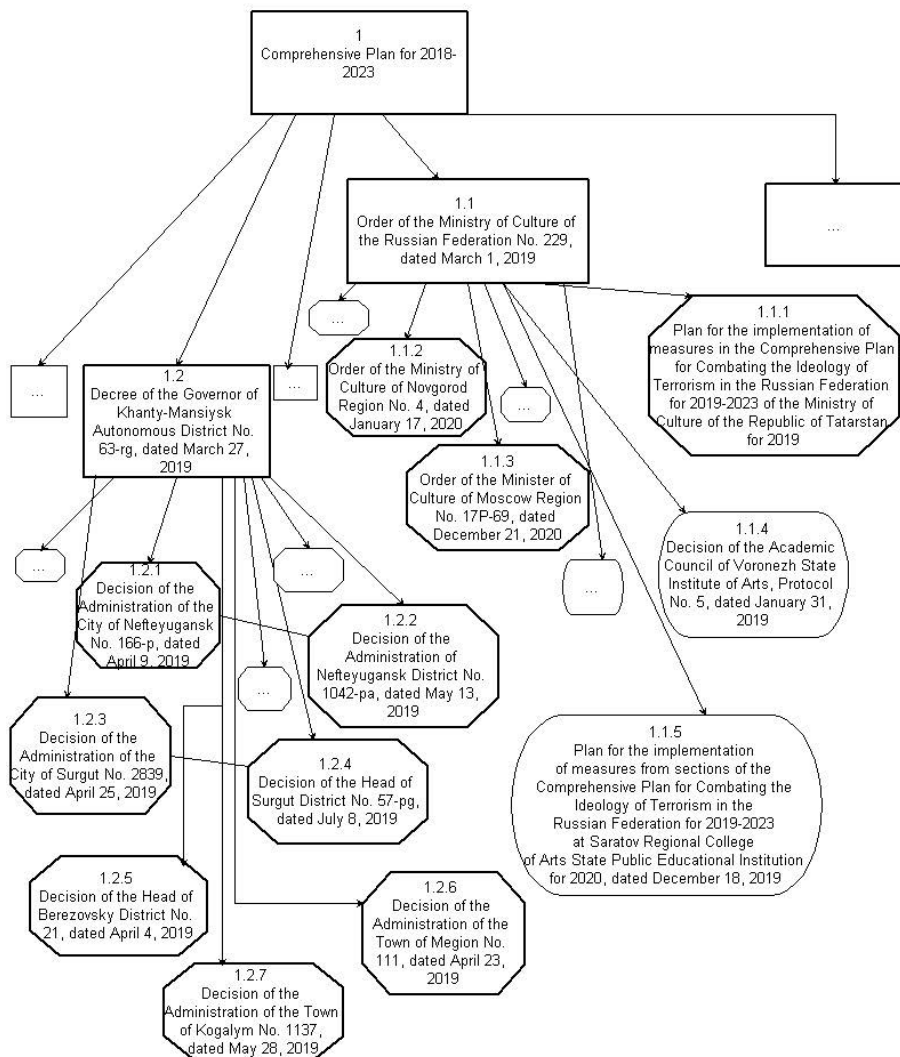
Only agents within the political-bureaucratic field had access to the production of securitizing first-order performatives. The performative approved by the key political actor—the President of the Russian Federation—held the highest power, while the derivative performatives served as tools to implement a new official vision.

Bureaucratic Structure as a Signaling Path for Securitizing Performatives

The example of the Russian Comprehensive Plans for Countering the Ideology of Terrorism clearly shows the fundamental importance of the bureaucratic structure for the (re)production of securitizing legal acts. Descending “from top to bottom,” from

the federal center to the regions along numerous bureaucratic chains, they generate a landslide of derivative securitizing legal acts at each new point of arrival: at the level of responsible ministries and departments, of regional and local authorities, of their subordinate organizations, and so on. This hierarchical spread is nonlinear and takes the form of an intensively branching graph, where the initial node constitutes the primary legal act with subsequent related legal acts forming multiple new nodes, which in turn generate new legal acts (Figure 2).

Figure 2
Graph of the Primary Legal Act With Subsequent Related Legal Acts



Each of the documents in Figure 2 (re)produces a securitizing performative, portraying individuals who come to Russia from certain countries for work or study as susceptible to the ideology of terrorism. Similar to the Italian case, these legal acts include algorithms for securitizing practices and specify the executors responsible for carrying out these practices.

In accordance with the logic of the bureaucratic field, the initiators of derivative securitizing performatives are professionals or bureaucratic organizations responsible for implementing scenarios launched by higher-level authorities. Most of the derivative legal acts analyzed were adopted on the initiative of regional heads and governments, regional ministries (often of culture, science, and education), regional anti-terrorist commissions (ATCs), or city and municipal administrations.

Of the 140 regional and local securitizing legal acts investigated, only 13 were initiated by an ATC, an organization specializing in security issues. It is important to note, however, that the heads of Russian regional governments also serve as ATC chairpersons. This dual role places them, like the Italian prefects, in the hybrid category of multidisciplinary professionals.

Executors of Securitizing Activities

The list of executors of securitizing activities is elaborated with each new securitizing legal act. Initially, these executors are only hinted at in federal plans, with basic references to the ministries and departments involved. However, as derivative legal acts are developed, these executors become more defined. They are first identified at the level of specific divisions, then individual positions, and finally, by name. Additionally, as the plans extend to local levels, the number of executors typically expands.

For instance, the Comprehensive Plan for Countering the Ideology of Terrorism for 2013–2018 initially mentioned only a few entities such as the Federal Migration Service, the Ministry of Internal Affairs, the Ministry of Regional Development, and antiterrorist commissions in Russian regions. However, subsequent legal acts specified additional executors from regional and local departments including education, youth, and culture agencies, departments of housing and communal services, transportation departments, and educational institutions under regional administrations.

Likewise, the Comprehensive Plan for Countering the Ideology of Terrorism for the subsequent years (2019–2023) initially designated the Ministry of Internal Affairs, the Federal Agency for Ethnic Affairs, the Ministry of Science, and the Ministry of Education, along with other relevant governmental bodies overseeing educational institutions. Additionally, regional executive authorities responsible for education, culture, youth, national policies, and sports were included as executors.

Subsequent legal acts related to securitization expanded the list of executors to include regional ministries and departments dealing with internal policies, health, information policies, public relations, labor, social protection, economics, social development, employment centers, and various other state and non-state organizations²¹.

²¹ The latter include mass media, religious, and other organizations which are “friendly” to regional and local authorities.

Meanwhile, in contrast to the primarily security-focused executors established by the Comprehensive Plan for 2013–2018 and its derivative documents (53 executors in this category compared to 20 non-security-related executors), the executors established by the Comprehensive Plan for 2019–2023 and its subsequent legal acts show a clear numerical advantage for professionals less involved in security matters (244 versus 91).

Algorithms for Securitizing Practices

Derivative legal acts related to securitization typically extensively reference their original sources, often quoting them verbatim. However, as can be seen from the Italian case, these derivative acts go further by providing detailed explanations and contexts to the initially general and vague scenarios from their sources. This elaboration ultimately results in specific securitization activities.

These activities can generally be categorized into three main groups, albeit with a certain degree of conditionality: the gathering and sharing of information concerning labor migrants and foreign students arriving from countries with heightened terrorist activity; verification measures concerning such foreign individuals, ranging from routine document checks to special operations and apprehensions; and preventive actions, such as lectures, discussions, cultural events, and dissemination of materials emphasizing the impermissibility of terrorist activities. These measures target both the foreign individuals themselves and various associated parties, including their employers, landlords, representatives of their diasporas, and heads of educational institutions.

As a rule, verification measures are entrusted to executors from among the security professionals, while preventive measures are assigned to specialists far from the security agenda who are responsible for issues of culture, education, sports, youth policies, the social sphere, employment, and other areas. As to the collection and exchange of information concerning targeted groups of foreigners, participation in this activity is prescribed for a wide variety of executors, from law enforcement officers to the management or individual employees of educational institutions providing training to foreign students. For example, one document obliges teachers to conduct monitoring of first-year students in order to identify persons who arrived from regions with increased terrorist activity (Saratovskii oblastnoi kolledzh iskusstv, 2020, p. 16) Another securitizing legal act requires police officers to request information from employers about the locations where Muslim migrants practice their prayer ceremonies (O reshenii, 2021, clause 1.4)

(Non)Performance of Roles, Cooperation, and Resistance by Executors

In general, as in the Italian case, Russian securitizing practices objectify the scenarios contained in securitizing legal acts. Reports cover all three types of securitization measures concerning specific groups of foreigners, including information gathering, verification procedures, and preventive actions. They specifically mention

interdepartmental information exchange and ongoing surveillance of incoming foreign citizens. Additionally, periodic interviews are conducted to ascertain the purpose of their arrival and identify both formal and informal leaders among them (Otchet o deiatel'nosti, n.d., p. 2). Regular document checks are reported to occur in places of mass gathering of migrants (Monitoring situatsii, n.d., p. 15). Law enforcement officials visit foreigners at their residences or workplaces, conduct inspections of mosques and prayer rooms, and engage in operational activities named *Nelegalnyi migrant* [Illegal Migrant], *Nelegal* [Illegal], *Siriiskii konflikt* [Syrian Conflict], and *Naemnik* [Mercenary]. Additionally, raids are carried out to identify extremist symbols and literature, particularly in Arabic (Rassokhin, n.d., p. 11). Finally, there are mentions of conversations with foreigners about the inadmissibility of violations of Russian legislation, about the arrangement of cultural, educational and social events, about the distribution of memos, about showings of anti-terrorist videos, and so on.

However, the scenarios do not always run smoothly. 10 out of 42 reports claim that no activities involving migrants were carried out. In seven cases, there were just no foreigners of the necessary category in the locality. In the remaining three, there were foreigners, but securitizing activities were ignored by the executors. As reflected in reports on the Comprehensive Plan for 2013–2018, no preventive work was carried out with labor migrants in six cases out of 15, and no work was carried out in one case out of 12 according to reports on the plan for 2019–2023²². In addition, two reports indicate that no preventive measures were taken in relation to foreign students.

In contrast to the Italian case, Russia had no incidents whatsoever of active resistance to the assignment of the role of executor. This suggests that the transformation of officials (less often private individuals) and organizations into executors of securitizing activities, as a rule, was successful. However, there is some evidence of passive resistance: apart from the already mentioned open disregard of the prescribed scenarios, more-or-less formal replies were observed, as well as the use of deliberately vague, general words. For example, one report included only official statistics on foreigners in the jurisdiction with a breakdown by country of origin and purpose of arrival. It additionally reported that “their presence does not have any significant impact on stability in the region” (Informatsiia po realizatsii, n.d., p. 3; Trans. by K. G.). In another, the entire report on work with foreigners was reduced to a single sentence: “The current situation associated with the residence of foreign citizens in the territory is stable and does not affect the crime situation in the area” (Otchet o rezul'tatakh, n.d., p. 1; Trans. by K. G.).

In contrast, some reports were highly detailed, with a long list of activities carried out with targeted foreigners, which likely indicates a proactive demonstration of diligence and a keen embrace of the executor's responsibilities. Thus, the strategies pursued by executors, as well as the degree of their enthusiasm towards the assigned scenarios, vary widely.

It should be kept in mind that a significant fraction of the securitizing practices targeting foreigners from certain regions (especially Central Asia and the Caucasus)

²² Only reports containing statistical information about the events held, and reporting about the presence of foreigners in the territory under their jurisdiction were taken into account.

existed even before the adoption of the Comprehensive Plans and was associated with the previous securitizing legal acts of the 1990s and 2000s. Consequently, some executors simply continued to do what they had been doing before, describing their ongoing activities in new forms of reporting. Nevertheless, the adoption of the Comprehensive Plans marked the approval of a new all-Russian official vision of natives of some countries as “persons susceptible to the ideology of terrorism” and led to the creation of an all-Russian exceptional regime for such a category of population.

Importantly, the securitizing performative and related securitizing practices met virtually no resistance from the affected group or external audiences, thus prompting no efforts towards desecuritization.

Russian and Italian Cases: Similarities and Differences

Analysis of the Russian and Italian cases reveals many similarities in the securitization processes in the two countries, despite the significant differences in their political systems and administrative structure, the composition of the groups affected by securitization, and the socio-historical contexts. In both cases, national securitization appears to have been preceded by regional securitization. The groups behind the initiation of securitizing legal acts and those responsible for executing securitization activities comprise a blend of political professionals, security experts, other bureaucratic professionals, and to a lesser extent, non-governmental actors. Securitizing legal acts demonstrated a remarkable capacity to (re)define security issues, such as those involving nomads in Italy and migrants from Muslim countries in Russia. These acts outline the measures aimed at addressing these perceived security challenges, along with the scenarios for their implementation by the designated executors.

The primary securitizing legal acts belonging to the key players in the political field necessarily generated derivative securitizing legal acts, which in turn generated new derivative securitizing legal acts, etc., constantly reproducing the same securitizing performative. While the performative moved from the center to the periphery, the range of executors was specified and expanded, and securitizing activities were clarified and contextualized.

Securitizing discourses and practices existed in close symbiosis. While objectifying the scenarios created by discourses, the actual practices did not always precisely reflect these scenarios. Instead, they relied on the capabilities, preparedness, and willingness of the executors to fulfill their assigned roles.

On the one hand, securitizing discourses and practices did not emerge *ex nihilo*, reproducing previous discourses and practices in varying degrees. On the other hand, they marked a visible gap in relation to the previous policy towards the affected groups, significantly deepening their exclusion from the general Italian and Russian populations. In Italy, nomads (gypsies), were officially declared a threat to public order and well-being and were subjected to a new exceptional regime affecting the entire Romani population of five Italian regions. As a result, many of them lost their homes, were relocated to the zones under increased surveillance that resembled detention centers for suspected criminals, or were expelled from the country. In Russia, migrants

from Central Asia, officially called “persons susceptible to the ideology of terrorism and influenced by it”, have been placed under increased surveillance all over the country and face various checks and suspicions of terrorist activity more often. Apart from the obvious similarities, there are important differences between the Italian and Russian cases. Setting aside the differences stemming from the socio-historical contexts of the two countries, it is necessary to consider variations in the evolution of the securitization processes under discussion. These differences are attributed to the awareness and responses of various audiences, including national and foreign non-profits, the judiciary, and the international political establishment.

In Italy, the securitizing discourse was constructed according to the classical model, including arguments about the existential threat to the reference object, the need for emergency measures, and the deviation from normal politics. With a focus on the external audience, it attracted significant media attention and sparked extensive social and political debates. Throughout these discussions, counterarguments from opponents of securitization were presented. Following the declaration of the state of emergency, it faced strong opposition from several human rights organizations, certain Roma families, and condemnation from pan-European institutions, reflecting Italy’s status as a member of the European Union. Litigation was initiated that ultimately led to the recognition of the primary securitizing legal act and its derivative acts as illegal.

The Russian securitizing performative was designed as a routine bureaucratic circular not intended for public discussion. Imitating an ordinary bylaw created according to the rules of normal politics, this is a good example of what is called lawful illegality or plausible legality.

In contrast to Berlusconi’s decree, the Comprehensive Plans for Countering the Ideology of Terrorism were not covered much by the media and remained largely unknown to the broader audience. The lack of objection led to the smooth operation of the nationwide securitizing performatives, which continue to be (re)produced to this day.

Final Comments

As this paper demonstrates, the examination of first-order securitizing performatives offers several significant benefits. These include the opportunity to rediscover and delve into the transformative effects of particular speech acts, the observation and analysis of the interdependent relationship between securitizing performatives and practices, the identification of institutional mechanisms underlying the functioning of performatives, and the accumulation of substantial empirical evidence regarding the composition of securitizers, the executors of securitizing activities, the diverse forms of securitizing practices, and more.

The proposed approach is effective for studying securitization processes in countries with different political regimes, including hybrid and non-democratic ones, which opens up opportunities for comparative cross-country studies beyond Western democracies. The approach involves shifting focus from the entire spectrum of political discourses on security and the vast array of securitizing practices to narrowing the research scope to key securitizing performatives and their associated practices. Its

strength lies in its ability to deepen our understanding of securitization processes. While this paper does not undertake a full-fledged comparative analysis, other projects, especially those conducted jointly by scholars from various countries, may enable detailed empirical cross-regional and cross-country comparisons. Additionally, this approach facilitates the acquisition of a more substantial and pertinent body of empirical data.

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ARTICLE

Trends in the Transformation of Gender Stereotypes: Representation of Women's Image in the Modern Media Space of Kazakhstan

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ABSTRACT

The purpose of the study is to assess the transformation of women's image in the modern media space of Kazakhstan. Using a mixed research approach, including a literature review, analysis of advertising materials, and expert surveys, the authors determine the role of the media in shaping the image of women. The results demonstrate that despite the growing trend towards diversity in women's roles, traditional stereotypes persist, especially in the context of traditional gender roles. The findings emphasize the importance of addressing gender inequalities in different sectors, including politics, business, and public participation. The gradual transformation of women's roles reflects social shifts influenced by globalization, feminism, and technological advances. The study underscores the need for further efforts to combat gender stereotypes and promote diverse portrayals of women in mass

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media. Despite the progress achieved, continued research, political measures, and initiatives to promote media literacy are needed to create a media landscape that would foster gender equality and expand the rights and opportunities of women in all spheres of social life.

KEYWORDS

media space, gender stereotypes, female image, advertising, politics, social roles

Introduction

At present, the image of women in the contemporary media space is undergoing a major transformation (Park et al., 2023). Traditional gender stereotypes are gradually abandoned. This takes place, on the one hand, under the influence of globalization, the gender equality movement, the development of feminism, and other processes in modern society. On the other hand, due to the advancement of the Internet, representations of women in the media are expanding and becoming more complex (Cardella et al., 2020).

We believe that among the most critical factors in this change are the development of digital technology and the rising role of mass media (Popova & Balezina, 2015). Due to their broad distribution and accessibility, digital technologies are becoming an integral part of modern people's lives, substantially reflecting and shaping social norms, convictions, and values, as well as ideas about the world. Researchers suggest that verbal and visual representations in the media reflect the cultural image of society (Bui, 2021; Chahbane, 2023). Meanwhile, in contemporary information society, individuals are under continuous influence of the information flow that is broadcast by the media (Barone et al., 2015; Chiang & Knight, 2011; DellaVigna & Gentzkow, 2010). Social media, however, do not present an independent information source, as they contain built-in messages and narratives that contribute to the formation of social beliefs and norms, particularly with respect to gender norms. Primarily, they aggregate content from various external sources and users, leading to a mix of perspectives with inherent biases (Jiang et al., 2021). The content visibility on these social media platforms is largely governed by algorithms that prioritize user engagement, often promoting sensational or controversial content over unbiased information.

Furthermore, these algorithms can create echo chambers, where users are mainly exposed to opinions and information that agree with their existing beliefs. This limits the exposure to diverse and independent viewpoints. Additionally, as commercial entities reliant on advertising revenue, social networks may feature content that aligns more with advertisers' interests than with the goal of providing independent information.

The open nature of such platforms also allows for the easy spread of misinformation. With limited fact-checking mechanisms (Zhang et al., 2021), it is challenging to ensure the accuracy and independence of all shared content (Talwar

et al., 2020). Moreover, regulatory and political influences in various regions can dictate content moderation policies, further affecting the neutrality of information on these platforms. Thus, while social networks offer a range of voices and perspectives, these factors significantly put at risk their ability to serve as truly independent sources of information.

Ideas about one or another role of women in the media space often reinforce or perpetuate traditional gender stereotypes, thereby shaping the way people perceive themselves and others in society. These stereotypes can also affect a variety of spheres, including education, career choices, and interpersonal relationships.

For example, mass media tend to depict women in roles that prioritize their appearance and household responsibilities, rather than intellectual abilities (Santonniccolo et al., 2023). As a result, young women can internalize the notion that academic achievement is not as important as conformity to traditional gender roles.

Furthermore, stereotypical representation of gender roles also has an impact on career choice. Women tend to be portrayed in low-status, low-paying jobs or as housewives, which can create the impression that some professions are unsuitable or unattainable for women. Therefore, women may face obstacles when attempting to enter male-dominated industries or leadership positions. The image of women in the media is context-dependent as it mirrors the unique societal norms, cultural values, and historical backgrounds of different regions. In media representation, cultural norms and values play a significant role (Shelomentseva et al., 2019). In societies with traditional views on gender roles, like Kazakhstan, women are often depicted in domestic or nurturing roles (Badiani et al., 2023). Contrastingly, in societies with progressive views on gender equality, women might be shown in a variety of roles, including leadership positions. Economic factors and media ownership also contribute to this context-dependency. Media outlets, influenced by their ownership and the economic conditions of their region, might portray women in ways that are consistent with the dominant economic activities or the interests of their ownership (Ward & Grower, 2020).

In recent years, there has been a growing recognition of the issue and a striving for a more responsible presentation of the female image in the media (International Media Support, 2020). It is important to note the commercialization of media and its dependence on sponsors, ratings, advertisers, and trending topics. This aspect indeed exerts a significant influence on media content, often leading to the perpetuation of popular stereotypes to attract a broader audience.

The audience's preferences are evolving, with an increasing number of consumers seeking content that promotes equality and social justice (Gohary et al., 2023). This shift in consumer sentiment can pressure media companies to alter their content to reflect these values, thereby serving both commercial interests and social causes.

In practice, however, this change progresses unevenly and with difficulties. While some countries have substantially succeeded in promoting gender equality and

inclusion, others still struggle against entrenched gender stereotypes and unequal representation. In essence, a large part of economic and political factors is obvious for each region, and their influence is difficult to overcome, which is why researchers strive to explain how this influence can be curbed. The reality is that the media may prioritize sensationalism and objectification in mainstream content or proceed from certain ideological goals, thus affecting the way women are presented in certain contexts (Rohman, 2020; Zubanova, 2008).

In our belief, the challenges at the heart of gender dynamics in various cultural, social, and political contexts are inextricably linked to the achievement of the Sustainable Development Goals on gender equality. First, the goals highlight the importance of eliminating all forms of discrimination against women. This refers not only to direct discrimination but also to the subtle biases embedded in social structures and media representations (United Nations, n.d.). By combating discrimination and gender-based violence and promoting fair representation in the labor market, mass media can serve as a powerful tool in changing social norms and building a world, in which women are depicted and viewed as equal in all aspects of life.

Literature Review

To outline the focus of our study, we first need to establish what is included in media space and how it affects the formation of the image of a woman in today's world. The most common definition of a media space was formulated by Stults (1986) in the mid-1980s:

An electronic setting in which groups of people can work together, even when they are not resident in the same place or present at the same time. In a media space, people can create real-time visual and acoustic environments that span physically separate areas. (p. 20)

Media space incorporates traditional mass media, such as television, radio, papers, and journals, along with digital media platforms, e.g., the Internet, social networks, and streaming services. Nim (2013) defined media space as both a cultural and social system, which plays an increasing role in the dynamics of modern sociocultural processes, with a system of values being developed and broadcast, orienting mass consciousness towards the adoption of universal, sometimes stereotypical, norms.

The media space created by electronic communication means is becoming the leading channel for transmitting national culture and its values; hence, it comes closest to the phenomenon of media culture. At the same time, the network media space is seen as an additional channel for preserving the values of ethnic cultures and spreading cultural heritage (Blokhin, 2016; Dzialoshinskii, 2013; Kirillova, 2020; Korobkova, 2019).

Thus, media space is not simply a reflection of reality, but an image of the world that is constructed socially and, in turn, reflects and constructs the social space.

In general, there are several key points in the understanding of media space. First, at its core are the means of mass communication, or mass media. Second, the media itself, and thus the media space, is an active subject in the formation of other spaces: social, cultural, political, and educational. Third, social change necessarily causes changes in the media space, which reflects the primary trends of social development. Fourth, the media space creates an image of the world that is beyond the individual's sensory experience. Fifth, the media space presents a system that has a certain set of interconnected structural components (Couldry & McCarthy, 2004; Monastyreva, 2010).

As emphasized by Maksimova (2011), gender is one of the characteristics that most comprehensively describes a person's essence in society, while gender identity, which touches upon the deepest layers of personality, is the chief aspect in its formation. In this light, the issue of the formation of a modern woman's image in contemporary media and the production, use, and manipulation of this image through mass media is acute at both the regional and global levels.

Women's image is constantly influenced both by cultural norms that establish what women should do and by social information that instills in people what a big difference there is between women and men (Baron, 2006; Xuan, 2022). Gender roles, which exist in society and are reflected in the media space, serve as socially imposed directives for women with respect to their appearance, interests, skills, behavior, self-esteem, and self-perception (Bobodzhanova, 2006; Mendes, 2011; Sokolova, 2013a, 2013b).

Researchers agree that the images of women presented in mass media shape and normalize ethnic, political, and gender roles and social relations, i.e., the "natural" occupations and tasks, responsibilities, desires, relations, ideas of success, and appearance of women (Azhgikhina, 2000; Haraldsson & Wängnerud, 2019), although what may appear "natural" is in most cases related to ideology and culture (Kochetkova, 2015; Zelova, 2017). Thus, the issue is how the dominant ideology determines the policy of representation and interpretation of women, the formation of whose image is influenced by cultural norms, historical peculiarities, and religious and everyday traditions of each country (Khabibullina, 2021).

Our study is focused on the representation of the image of a woman in the modern media space of Kazakhstan. In current understanding, Kazakhstan has been an independent state for only 30 years, different from its previous existence as part of the USSR. These changes in political status have caused a transformation of cultural identity. The nation is oriented towards the legacy of Soviet culture but is building its own cultural structure at the same time. In addition, since Kazakhstan is a multi-ethnic country that encompasses several religious beliefs, the religious landscape plays a key role. For example, the most widespread religions in the country are Islam (70.19%) and Christianity (26.17%). Smaller religious communities, such as Buddhists, Jews, and others, also contribute to the cultural and religious dynamics of the country. The coexistence of different denominations and their traditions, in turn, has a greater impact on gender dynamics, as the portrayal of women can vary considerably in these cultural contexts.

By analyzing women's images and the context, in which they are depicted, it is possible to gain a deeper understanding of the significance of certain social relations, identity, and gender practices that determine the image of women and their status in a particular culture. This necessitates studying the transformation of the women's image in the modern media space of Kazakhstan.

To address this issue, it is important to note that globalization, feminism, and technological progress have significantly influenced the transformation of women's roles in Kazakhstan. The influence of global media and cultural exchanges has introduced new ideas about women's rights and gender equality, challenging traditional norms (Iqbal et al., 2022). The feminist movement, both globally and within Kazakhstan, has played a crucial role in empowering women. An example of this is the growing number of women-led NGOs and advocacy groups in Kazakhstan, which work towards gender equality and women's rights, mirroring global feminist agendas (Nadirova et al., 2022). Technological progress, especially through digital platforms, has given women in Kazakhstan a powerful tool to express themselves, share experiences, and mobilize for change. Women in Kazakhstan actively engage in creating their visibility regimes, using platforms like blogs and public forums to discuss issues like work-life balance, career development, and gender equality (Lövheim, 2013). For instance, online campaigns or articles written by Kazakhstani women that highlight the challenges and successes of balancing professional and personal life provide insights into their evolving roles (V Almaty sostoialsia forum, 2023).

Thus, the present study aims to assess the transformation of the image of women in the contemporary media space of Kazakhstan.

Methods

In connection with the purpose of the study, we adopted a mixed approach to the research. The study of the women's image transformation in the modern media space of Kazakhstan was conducted from August to December 2022 in several stages.

The first stage involved the analysis of literature and documents. Its primary purpose is to provide a comprehensive overview of existing research on the topic. It sets the stage for the current research by summarizing and synthesizing previous studies, identifying gaps in the existing body of knowledge, and demonstrating the relevance and necessity of the current study. The data for the study were selected and grouped by the document type. The first group of documents comprised sociological surveys available on the official websites¹ of state bodies of the Republic of Kazakhstan. The second group of documents consisted of 55 scientific articles and conference papers by researchers from around the world (interviews, short report articles, and research papers that have been published in journals indexed in Scopus² and Web of Science³ databases for the last 10 years).

¹ For example, <https://halykfinance.kz/>, <https://www.zakon.kz/>, <https://tengrinews.kz/>.

² <https://www.scopus.com>

³ <https://www.webofscience.com>

At the second stage of the study, we recruited 25 experts to participate in the survey. The sampling criterion for experts was that they had at least three articles on the topic under study, published in journals indexed in Scopus and Web of Science. The experts were sent emails asking them to assess the reliability of the selected materials. The experts were also informed of the topic of the present study. The survey used a questionnaire containing questions and ranks in descending order (Table 1). The questionnaire was accompanied by a list of sources, with a number assigned to each source. The experts rated the sources on the Harrington scale by marking them in the Source No. field.

Table 1
The Expert Survey

Source No.	Rank	Nominal scale
	10	Central source on the topic
	9	Very important
	8	Important
	7	Needs to be considered
	6	Interesting source, to be considered only if the authors deem it necessary
	5	Interesting source, but does not need to be considered, as it goes beyond the research topic
	4	Not too important
	3	Unimportant
	2	Supplements the sources already noted
	1	Out of discussion

The questionnaire was compiled in two languages (Russian and Kazakh) and was to be filled in by the experts within 20 calendar days. These terms ensured equal opportunities for experts thus providing them with the same information interval of incoming information when answering the questions.

The third stage involved processing the collected information, its classification by significance, and interpretation of the results. The sources that were not described as significant enough were excluded.

The fourth stage consisted of a formalized analysis of advertisement texts (Voskresenskaia, 2019) based on the information selection procedure: (a) analysis scheme, (b) definition of units for analysis, and (c) definition of counting units.

The object of the study was the leading electronic editions of Kazakhstan. In total, the study monitored 11 electronic periodicals released in the first half of 2016 and 2022. To determine the transformation of the image of women in the modern media space of Kazakhstan, we analyzed 660 website-days, of which 330 occurred in the six-month period from January 1 to June 30, 2016 and 330 occurred in the six-month period from January 1 to June 30, 2022 (Table 2).

Table 2*Sampling of Website-Days to Quantify the Representation of Women in Electronic Media*

Type of mass media	Electronic periodicals	Number of website-days	
		2016	2022
Online versions of printed media	Kazakhstanskaya Pravda ⁴	30	30
	Liter ⁵	30	30
	Time.kz ⁶	30	30
	Karavan ⁷	30	30
	Novoe pokolenie ⁸	30	30
	Respublika ⁹	30	30
	TengriNews ¹⁰	30	30
Online media	NUR.KZ ¹¹	30	30
	Zakon.kz ¹²	30	30
	Sputnik ¹³	30	30
	Bizmedia.kz ¹⁴	30	30
Total		330	330

An additional unit of analysis was the number of female advertising images, which enabled their quantitative assessment. For this, we calculated the frequency of the content categories and the intensity of manifestation of their features in the website's advertising materials.

In the text of the selected electronic publications, we analyzed all advertising and information-analytical materials. The choice of publication days was based on the principle of step-by-step selection, i.e., the websites were analyzed one by one, one website per day.

The study focused on two types of advertising texts:

- verbal advertising materials presenting images of women;
- photographic advertising materials presenting images of women.

⁴ <https://kazpravda.kz>

⁵ <https://liter.kz>

⁶ <https://time.kz>

⁷ <https://www.caravan.kz>

⁸ <https://www.np.kz/>

⁹ <https://respublika.kz.media/>

¹⁰ <https://tengrinews.kz/>

¹¹ <https://www.nur.kz/>

¹² <https://www.zakon.kz/>

¹³ <https://ru.sputnik.kz/>

¹⁴ <https://bizmedia.kz/>

Women's images in advertising were recorded in the following types of advertising material: politics and governance; professional orientation (business, labor relations); household (everyday life), culture, tourism, healthcare, education, and services. In addition, we recorded advertising contexts that referred to female representatives of different spheres: business, industrial, domestic, leisure; social participation; and material contexts. Photographs and drawings of female characters in advertisements were also documented in relation to the specific sphere and context.

Results

The analysis of the sources shows that one of the main goals of Kazakhstan is to make significant progress towards achieving the Sustainable Development Goals related to gender equality. One of the tasks in gender equality is the *elimination of all forms of discrimination*: Kazakhstan's commitment to gender equality is evident through its participation in international conventions, in particular the United Nations Convention on the Elimination of All Forms of Discrimination against Women (UN Women, n.d.). This includes regular reporting to the UN Committee and responding to recommendations on key issues, such as women's access to justice and combating gender discrimination (Tekkas-Kerman & Ozturk, 2022).

The next objective is to *counter gender-based violence*. The efforts of Kazakhstan to combat gender-based violence are reflected in the adoption of the Law of the Republic of Kazakhstan No. 214-IV *O profilaktike bytovogo nasillia* [On the Prevention of Domestic Violence] (2009) and the harmonization of Kazakhstan's legislation with the Council of Europe Convention on Preventing and Combating Violence Against Women and Domestic Violence (Council of Europe, n.d.). The country's determination to expand crisis centers and explore the possibility of criminalizing domestic violence reflects a dedication to protecting the rights and well-being of victims, which is an important step toward addressing this pervasive problem.

Another task consists in *eliminating discrimination against women in the labor market*. While Kazakhstan's labor legislation upholds the principle of gender equality and non-discrimination, it does recognize the challenges women face in the labor market. Noticeable progress has been made in increasing women's participation in various sectors. For example, the State Statistics Service indicates that the wages of women are 20.0%–21.3% lower than those of men. That notwithstanding, in recent years, women's activity in business has grown considerably, and about 28% of managers of small, medium, and large enterprises in Kazakhstan are women. One in four (23.1%) peasant and agricultural farms is headed by women, and in trade unions and scientific production associations, women hold 32.4% of leadership positions. Kazakhstan's emphasis on updating the list of jobs that prohibit female labor demonstrates a proactive approach to ensuring gender parity in employment. Nowadays, with the development of technology and the automation of production processes, the list of professions prohibiting the use of women's labor is being shortened. In 2018, the list of these professions was cut from 287 to 187 (Khamenova, 2018).

Cumulatively, these efforts demonstrate Kazakhstan's commitment to achieving gender equality by addressing discrimination, countering gender-based violence, and striving to eliminate gender inequality in the labor market. According to the experts' evaluations, the selected documents were distributed as follows: on average, the documents were evaluated at a high level (according to the Harrington scale evaluation criterion, the "High" value starts from 0.64–0.80).

The summarized results from the expert survey on the reliability of selected documents are as follows: out of 25 proposals that were sent to experts, 21 completed questionnaires were returned. This indicates a good response rate from the experts. The survey revealed that the average reliability score assigned to statistical data within the documents was 0.81 points. This suggests that the statistical data is considered highly reliable. On the other hand, the average reliability score for analytical data was 0.69 points. This lower score implies that, although the analytical data is deemed reliable, it may not be viewed as robustly as the statistical data. These findings provide a snapshot of the experts' assessments concerning the reliability of both statistical and analytical data in the documents evaluated.

According to sociological surveys (Uskembraeva et al., 2016), most people in Kazakhstan believe women should necessarily participate in politics, although 22.7% believe they should not, and 19.0% do not have their own opinion on this issue. The region of residence also influences attitudes to women's involvement in politics. Residents of megacities (69.2% in Astana and 63.25% in Almaty) are more tolerant of women's political activity than residents of provincial cities. Meanwhile, women themselves are more confident in the need for women's participation in politics (64.5%) than men (49.3%).

Of note are also age differences. Older respondents (45–60 years old) are more convinced of the importance of women's participation in politics than other age groups (73.2%). It is noteworthy that young people (18–30 years old) are most confident that women have no place in politics (26.8%). Among the representatives of the oldest age group (over 60 years old), the greatest number (34.8%) doubt the need for women's political participation.

Representatives of Russian nationality are more inclined to agree with women's engagement in politics (67%) than Kazakh (56.5%) and other nationalities (51%). Among those who advocate for women's presence in politics, 39.5% believe it will make the state's social policy more effective, and 32.6% consider women more informed about pressing social problems. Notably, 43% of women believe that "women are needed in politics because they are more cunning and resourceful than men." At the same time, 38.2% of men are convinced that the social policy of the state is more effective when women participate in politics.

Among those who have a negative attitude to women's political activity, 14.4% consider it impossible because of the incompatibility of this occupation with family and motherhood; 9.4% believe that politics is too complicated for women; 6% think that "politics is the men's domain."

The sociological survey results thus demonstrate the overly traditionalist attitudes of Kazakhstani citizens regarding the possibility of women's

participation in politics. The results of analysis of materials on the representation of the image of modern women in advertising also confirm that mass media most often offer depictions of women in stereotypical roles. This not only reinforces traditional gender norms but also emphasizes the prevailing societal perception that women have primary responsibility for the domestic and emotional aspects of life (Table 4).

Table 4

Representation of the Image of a Modern Woman in Advertisements, Depending on the Type of Advertising Content

Advertising context type	Number of advertising materials, pcs.	
	The year 2016	The year 2022
Politics and governance	23	49
Professional direction (business, labor relations)	48	67
Housekeeping	214	198
Healthcare	57	61
Education, culture, tourism, sports	74	81
Service industry	147	138
Total	563	594

It can be stated that the portrayal of women in advertising in Kazakhstani media predominantly revolves around a limited set of social roles and functions. That is, advertising in electronic media reproduces the traditional version of the gender order as the dominant one. These are often the upbringing, educational, and family roles and functions, as well as the role of a consumer of goods and services. In addition, women are depicted as experts in social matters, persons emotionally engaged in public or personal events, as well as mothers and guardians of the hearth (Kabzhaliyeva, 2023).

For a comprehensive analysis of the figurative characteristics of women in advertising, the visual materials presented in the online media advertising messages under study should be noted. This attention owes to the fact that the visual presentation of information is one of the most impactful ways to influence the audience’s perception (Belkovskii & Savinova, 2017). The distribution of visual images of women in advertising by spheres of employment confirms the previously derived trend. In general, across all the considered female images in advertising, about a third refer to the household sphere, about as much relate to the service industry, around a quarter are connected with culture, education, tourism, and sports, and other areas of women’s employment are represented insignificantly (Figures 1 and 2).

Figure 1*The Image of a Woman in Education Advertising**Note. Source: Dostizheniia studentov (n.d.).***Figure 2***The Image of a Woman in Household Advertising**Note. Source: Samsung Kazakhstan (2019).*

On the other hand, our findings point to a gradual transformation of the image of women in advertisements. In particular, the presence of women in political advertising has more than doubled (Figure 3).

Figure 3
Women in Political Advertising



Note. Source: Partia "Ak zhol" (2019).

An important aspect in recording the advertising images of women in the media is the context in which they are mentioned regardless of affiliation to one or another social sphere (Table 5). The context points not so much to the formal affiliation of characters with a certain sphere, as to the semantic and, to some extent, stylistic features of their presentation (Pashinian, 2012). For each sphere of activity, we have specified the following main contexts:

- business—if the advertising character is depicted in any sphere in connection with professional work or performing their job responsibilities;
- household, leisure—the advertising character is portrayed out of work and out of any important business, or in connection with purely domestic, communal matters;
- the context of public participation applies to advertisements covering some active public actions, expressing and defending one's positions on improving public life, etc.

It is important to note that contexts are not strictly distinct meaning categories and can well intersect or overlap. Therefore, the same character in each reference may be presented in different contexts or may not fall into any of the above-mentioned ones. Overall, female characters are portrayed in online media advertising mainly in the household and leisure contexts.

Table 5

Representation of the Image of a Modern Woman in Advertisements, Depending on the Type of Media Context

Media context	Number of advertising materials, pcs.	
	The year 2016	The year 2022
Business	43	125
Production	68	77
Household	228	231
Leisure	217	201
Public participation	38	94
Material context	17	18

At the same time, there has been a significant rise in the image of a modern woman in the business context, presented, first and foremost, as a structural-status unit participating in social production and meaningful professional and labor activity. In this way, Internet advertising shows a gradual transformation of the female image. The image of a working woman is gaining importance. However, the focus of specific publications stimulates their saturation with other parity images. For example, the context of public participation of women is clearly presented in social advertising on the website NUR.KZ with high shares of public context.

To summarize the research results, we conclude that advertisers prefer to place photos of cultural and sports stars and women in non-production settings in advertising messages. That is, the world of culture and recreation is seen in advertising as more acceptable for the visual portrayal of women to their audiences.

An important characteristic of women's visual images in advertising is their age. This factor majorly differentiates female images. Overall, more than half of all women's images in advertising are young women (57%), which is far beyond the share of mature (36%) and older women (7%). The obtained data evidence that advertisements most often use the images of young women, meaning that this figure is believed by advertisers to be the most attractive to the audience.

The peculiarities of reference to the image of women in advertising in electronic publications are summarized as follows. In terms of frequency, young women in advertising are most often found in "Culture," "Household," and "Sports" settings, while mature women are presented in "Culture" and "Household" contexts, and older women are presented in the "Household."

Discussion

In this study, we sought to determine whether there are only traces of gender stereotyping in Kazakhstani media, whether it is fully manifested here, or whether the publications studied show a clear focus on overcoming gender stereotyping.

We conclude that the roles and situational contexts, in which women are predominantly shown in advertising, can be categorized as follows:

- inclusion in “serious affairs,” i.e., advertising images of women actively engaged in “serious” affairs and proud of the fact that they succeed in something are presented;
- a woman as a guardian of the hearth, who is not so much a high professional as a hostess who helps in difficult moments and heals and restores the human soul.

Thus, our research findings suggest that female role stereotypes are gradually blurring and being supplemented with new advertising images, e.g., women’s participation and presence in politics, production, and everyday life, as well as in the context of public participation. Although the most traditional image of a woman in advertising remains to be that in the household associated with the context of home, family, and children, as corroborated by Naisbaeva (2017).

Our findings align with the conclusions of Beisenova and Imambaeva (2016) noting that in most cases, Kazakh advertisements portray the man as a successful businessman, specialist, leader, and the head of the family, while the woman is depicted as a happy housewife, model, or subordinate worker. In addition, the images of women are used predominantly to advertise cleaning products, laundry detergents, hair care products, and dairy products. The constant depiction of women in a household setting is supported by the findings of Ward and Grower (2020), which show that despite all the achievements, household roles continue to be the common topic for women in media narratives across cultures.

In our view, gender stereotypes in advertising have a particularly destructive impact on young audiences with unstable opinions and underdeveloped personal viewpoints. This belief is shared by Santoniccolo et al. (2023) who stress the importance of early media coverage in the establishment of children’s perceptions of and attitudes to gender roles. The researchers argue that the inability of such a young audience to have critical thinking or awareness of the ambiguity of reality makes it more receptive to information. For this reason, the media literacy programs are becoming more essential. For example, programs that address gender inequality and the misrepresentation of women in the media are beginning to emerge. Such programs help people to analyze media messages instead of passively consuming content and potentially receiving misinformation, enabling them to identify gender stereotypes.

Nevertheless, women remain the primary object of gender discrimination associated with gender stereotypes. Gender stereotypes have a detrimental effect on women’s position in society and limit their opportunities. This ultimately leads women to experience social discontent and curbs their involvement in the development of effective economic and political models of the country’s governance and development. Nonetheless, political, economic, and social initiatives facilitate the development of democratic institutions, along with a higher level of culture and tolerance in society (Hu & Lee, 2018; Podobnik et al., 2019).

The importance of rejecting gender stereotypes in advertising is reaffirmed by existing international standards. In particular, the Recommendation on Gender Equality and the Media adopted in 2013 by Council of Europe declares gender equality

a prerequisite for achieving social justice and true democracy (Council of Europe, 2013). Media representatives are offered recommendations on the creation of internal self-regulation and oversight mechanisms for media market players, as well as on the adoption of an ethical code and media coverage standards to promote gender equality and prevent the distribution of gender discrimination content, as well as the objectification and stereotypical images of women and men in advertising.

As of today, the negative impact of gender stereotypes is also acknowledged by some transnational companies. For instance, one of the largest consumer goods producers in the world, Unilever¹⁵, after a series of studies, has decided to refrain from using stereotypical images of men and women in promoting their products. Furthermore, in the summer of 2017, Unilever, in partnership with UN Women, and with the support of other industry leaders, announced the creation of the Unstereotype Alliance. The leading goal of the Alliance is to bring about positive cultural change through realistic and non-stereotypical depictions of women and men in advertising (Unilever, 2017).

Conclusion

The conducted study of the representation of women's image in the modern media space of Kazakhstan offers the following conclusions. It is important to note that despite the major changes that today's media space of Kazakhstan is undergoing considering globalization processes, the struggle for gender equality, and so on, advertising still preserves traditional gender roles. Nevertheless, a positive shift is observed in the increasing representation of women in such spheres as politics and production, which reflects the growing recognition of women's contribution beyond traditional gender boundaries.

Despite the influential role these achievements have in the creation of the image of a woman, research stresses the urgency of eliminating the leading gender biases that continue to shape media narratives.

The novelty of the study lies in its specific focus on the evolving portrayal of women in the media landscape of Kazakhstan, a relatively underexplored area in gender studies. It integrates the impact of globalization, feminism, and technological advances on this transformation, offering a unique perspective that combines sociological surveys and analysis of advertising materials.

The study on the transformation of women's roles in Kazakhstani media offers significant theoretical implications across various academic disciplines. It enhances gender studies by providing a unique regional perspective, contributing to a more global understanding of women's evolving roles. In media representation theory, the study sheds light on how different cultural contexts influence the portrayal of women in media, thereby affecting societal perceptions and gender norms.

The research underscores the importance of intersectionality, emphasizing how factors like culture, religion, and socio-economic status interplay in media

¹⁵ Unilever® is a trademark of Conopco, Inc. <https://www.unilever.com>

representations. This aspect is particularly relevant for understanding the complex dynamics of gender portrayal.

With the ongoing development of Kazakhstan, promoting media literacy and cooperation with international organizations is becoming an important strategy. Offering people, especially the younger generation, tools for critical analysis of mass media messages and developing social support programs can help foster a generation of insightful consumers less susceptible to the preservation of stereotypes.

Thus, while providing people, especially the younger generation, with tools to critically analyze media messages along with developing social support programs can help foster a generation of discerning consumers who are less susceptible to perpetuating stereotypes.

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ARTICLE

Fertility in Child Marriage Families: In-Depth Investigation In Indonesia

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ABSTRACT

Fertility is a primary determinant of population growth rate. Theoretically, child marriage families have a higher chance of fertility. Accordingly, this study aims to comprehend the interpretation of fertility among the family from child marriage. The interpretation of fertility was observed in depth using phenomenology (causal motives) through data collection and analysis. The research participants were married women who had children or were 16 years old or younger and did not yet have a child. The analysis results indicate that child marriage families interpret fertility as a burden, marriage reinforcement, and investment. The families from child marriage are motivated to have fewer children and space them out in terms of age. It is important to note that no child-free doctrine was discovered, as it goes against Islamic principles. Additionally, having children is believed to improve marital relations within the child marriage community on Bawean Island. Children are often viewed as an economic investment and a guarantee for future parental care. Child marriage on Bawean Island did not have a discernible impact on the population growth rate.

KEYWORDS

children, child marriage, child marriage families, fertility, Indonesia, phenomenology

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HUMAN SUBJECTS

The research, which was conducted on Bawean Island, Gresik Regency, East Java Province, was supported by a recommendation for a local area research permit with letter number [070/381/437.117/2022].

Introduction and Background

According to the 2020 Population Census, Indonesia's population was 270,203,917 people (Badan Pusat Statistik, 2021), positioning Indonesia in the top four most populous countries in the world. Although the population growth rate has decreased slightly, it remains at 1.25% in 2020, 1.27% in 2022, and is projected to be 1.29% in 2023 (Badan Pusat Statistik, 2023). According to a report by the United Nations, from 2017 to 2050, approximately half of the world's population growth will be concentrated in nine countries, including India, Nigeria, the Democratic Republic of Congo, Pakistan, Ethiopia, the United Republic of Tanzania, United States, Uganda, and Indonesia (ranked by expected contribution to total growth) (United Nations, n.d.).

The population of Bawean Island was 80,289 people in 2020, with a population growth rate of 1.98% (Badan Pusat Statistik Kabupaten Gresik, 2021), exceeding the national population growth rate of 1.25% during the same period (Badan Pusat Statistik, 2021). This population growth on Bawean Island is determined by fertility, with a total fertility rate (TFR) reaching 2.11 (Badan Pusat Statistik Kabupaten Gresik, 2021). This rate is lower than the national TFR of 2.19 (Badan Pusat Statistik, 2021). The high fertility rate is caused by a variety of factors, including women's education, media access to family planning information, economic status, marriage age (child marriage), and perceptions of the ideal number of children (Gayatri, 2020; Onagoruwa & Wodon, 2018; Vander Borgh & Wyns, 2018).

Child marriage occurs throughout Indonesia (Kementerian Kesehatan Republik Indonesia, 2020; Badan Pusat Statistik et al., 2020), including in remote parts of the island of Bawean. During 2010 and 2019, 7% of child marriage cases were reported, involving those aged between 15–16 years (Kementerian Kesehatan Republik Indonesia, 2020). On Bawean Island, there were 689 cases of early marriage among 15–16-year-olds from 2015–2020 (Kementerian Kesehatan Republik Indonesia, 2021). Meanwhile, there were 119 divorce cases that occurred on the Island in 2020 (Mahkamah Agung Republik Indonesia, 2020). Meanwhile, the data also showed 13.5% maternal mortality and 1.7% infant mortality rates (Dinas Kesehatan Kabupaten Gresik, 2021). Further, the life expectancy in Bawean in 2020 was 72.66 years old (BPS Provinsi Jawa Timur, 2021), which is lower than the national average of 73.93 years old.

Several other developing countries also reported determinants of adolescent girls engaging in early marriage practices. For instance, in Iraq, the fertility rate of adolescents (15–18 years) has increased by 30% (Cetorelli, 2014). Meanwhile, in Colombia, the fertility rate of women between 15 and 19 years in urban areas was reported to be higher, particularly between 2012 and 2016 (Ramos Jaraba et al., 2020). Child marriage is common in areas with low incomes and a high population growth (Liang et al., 2021). A secondary cross-case analysis of three qualitative studies conducted in Brazil, Guatemala, and Honduras revealed that social norms play a significant role in regulating acceptable actions by girls, contributing to the exercise of agency, and accommodating girls into early marriage (Taylor et al., 2019).

Bawean Island has a population of 25,119 families, with almost 2.3% of them affected by child marriage. The prevalence of child marriage on Bawean Island is mainly due to low levels of education, with only 36,224 people graduating from elementary and junior high school (Kementerian Pemberdayaan Perempuan Dan Perlindungan Anak, 2021). Further, child marriage also hinders the child's education continuation. In Honduras, many girls drop out of school due to financial constraints or personal choice rather than solely due to marriage or motherhood (Murphy-Graham et al., 2020). In India, the dropout rate for female actors is high (Ashburn et al., 2017), while Iraq reports an increased prevalence of early marriage, especially among women with low education (Cetorelli, 2014). In Kosovo, there is a low level of motivation among those engaging in early marriage to continue their education (Hyseni Duraku et al., 2020). This issue has also been reported in Nigeria (Polyakova, 2018).

Aside from education level, economic status has also been acknowledged as a factor affecting fertility. There are 76% of child marriage families that belong to the low-income group (Badan Pusat Statistik Kabupaten Gresik, 2021). The low economic status of child marriage families is primarily due to the husband being the main source of income. On Bawean Island, most wives of child marriage families work as housewives (Susilo, Istiawati, Deffinika, & Budijanto, 2021). Therefore, women who marry at child age have lower participation in family income (Parsons et al., 2015).

To date, there have been no phenomenological studies that observe the interpretation of fertility among child marriage families. It is important to examine the various meanings that child marriage families attribute to fertility, as it occurs due to child marriage (Ojala et al., 2017). Bawean Island was selected as a research venue due to the continuous complexity of its problems, which include high population growth rates due to fertility, high rates of child marriage, as well as economically and educationally marginalized families who practice child marriage. Therefore, this research investigates the interpretation of fertility among child marriage families. A qualitative–phenomenological approach has been applied to examine the motives behind child marriage families' interpretation of fertility.

Qualitative research has been claimed to generate empirical data as it involves observation, according to common sense, and does not produce anything speculative (Blokker, 2011). Additionally, a qualitative approach can be used to perceive the values present in society (Sejati et al., 2023) and observe the social interaction of the community with the environment (Angriani et al., 2018). A qualitative approach

has also been used to study the manifestation of gender construction (Defi et al., 2022). Similarly, research into early marriages in Indonesia with a qualitative-phenomenological approach has been carried out (Rahiem, 2021; Susilo, Istiawati, Aliman, & Alghani, 2021; Susilo et al., 2022).

Focusing on the global prevalence of early conservation is crucial to protecting human rights, particularly the welfare of children (Mehra et al., 2018; Samuri et al., 2022). In Honduras, early marriage has a significant effect on intimate partner violence (Huber-Krum et al., 2024). Consequently, the United Nations led the campaign to resolve this issue, which was participated in by various countries. For instance, a joint campaign by local and national agencies and UN partners in the Dominican Republic aimed to support legal reform on the age of marriage. This campaign brought attention to such issues as child marriage, equality, and early marriage in Parliament (UNICEF, n.d.). In Colombia, the National Development Plan (2018–2022) includes a goal aimed at eliminating child and early marriage (UNICEF, n.d.). Meanwhile, in Indonesia, the reduction in the prevalence of cases of early marriage is set through a special target of early marriage in the 2020–2024 National Medium-Term Development Plan (Badan Pusat Statistik et al., 2020).

This research seeks to explore how families engaged in child marriage interpret fertility and its impact on population growth. To achieve a deeper understanding, individuals can explore the principles of life (virtue) in depth (Ayuningtyas & Riyono, 2023). Further, the results of in-depth studies can be used by authorities to prevent or change attitudes and practices in child marriage families towards fertility, which can have a significant impact on population growth.

Research Methodology

This qualitative study employed a phenomenological approach from Alfred Schutz's perspective to examine the social context and determine the meaning of fertility for child marriage families on Bawean Island, Indonesia. Phenomenology is a process of understanding the world through direct experience, allowing researchers to obtain meaningful insights from participants regarding a phenomenon. This is achieved by exploring their personal background, memories, thoughts, views, purpose, hopes, and feelings (Hammersley, 2019; vom Lehn, 2019). The participants were selected based on the minimum marriage age described in the Republic of Indonesia's Law No. 1 of 1974 concerning Marriage, Chapter II Marriage Requirements, Article 7 Paragraph 1. Despite the fact that the minimum age for marriage was raised to 19 years in 2019, we discovered that the participants who met the criteria were women who were married with children or unmarried and under 16 years old (Undang-undang Nomor 16, 2019).

The phenomenological approach uncovers the because-motives and in-order-to motives of child marriage families in interpreting fertility. The researcher served as the main data collection instrument to identify participants' experiences of context and social reality, as well as their goals (expectations) related to fertility. The questions developed by the researcher covered the topic of because-motives and in-order-to motives related to fertility. This study also employed data collection techniques to

facilitate fieldwork, which was adopted from reliable sources, including the importance of field observation and participant observation (Moleong, 2018). Meanwhile, the interactive data analysis was completed using the stages adopted from Miles and Huberman (1994). The field observations that connected the early marriage phenomenon among the villagers of Bawean Island for two weeks were described, including the problem’s specifics and the initial data collection procedure, as well as the names of female actors. For the collection of authentic data and information, the researchers physically presented at the research location. The complex structure of the interpretation of the meaning of fertility was explored through observation and in-depth interviews. The following factors were considered in understanding the research participants’ interpretation of fertility: (a) the desired number of children in the future, (b) the preferred child gender, (c) the preferred age gap between children, and (d) the reasons for delaying childbirth.

The researcher’s participation is essential as a research instrument and data collector (Chesebro & Borisoff, 2007; Fatchan, 2011). Specifically, the research was conducted in Daun Village (163 incidences) and Sungairujing Village (132 incidences), Sangkapura District, Bawean Island, Indonesia (Kementerian Kesehatan Republik Indonesia, 2020), which has the highest prevalence of child marriage on the island. This research focused on child marriage families on the women’s side. Participants were determined using a *snowball sampling technique*. Information such as the participant’s name, age, education, and occupation were obtained from the Office of Religious Affairs in Sangkapura District. This research was completed in 2022. In total, this research involved 37 wives from child marriage families, as this number exceeded saturation and met the research objectives (Hennink & Bonnie, 2022). Table 1 summarises the characteristics of these participants.

Table 1
Social Characteristics of Participants

Characteristic	No. of participants (%)
Age at Marriage	
Age 15	12 (32.4)
Age 16	25 (67.6)
Occupation	
Housewife	32 (86.4)
Shopkeeper	4 (10.8)
Wedding Singer	1 (2.8)
Education	
Middle School Graduate	27 (72.9)
Elementary School Graduate	10 (27.1)
Current Children	
No Children Yet	3 (8.2)

Table 1 Continued

Characteristic	No. of participants (%)
Pregnant	2 (5.4)
1	21 (56.7)
2	9 (24.3)
3	2 (5.4)

Note. Source: Adapted from Al'Ghani et al. (2024).

The primary data were collected from the wives of families engaging in child marriage, while the secondary data were garnered from the parents and husbands who were present during the interview. As part of the data-gathering process, the research participants were interviewed in person at their homes. On average, each interview took almost half a day. The secondary data from the participants' parents and spouses may complete the primary data. The data collected from in-depth interviews were transcribed into written transcripts (Moleong, 2018).

To facilitate communication and comprehension, the researcher enlisted the help of two local village authorities, Mr. S and Mr. D, to assist with direct interactions regarding the issue of child marriage. During the interviews, some participants used words in Bawean that were unfamiliar to the researchers. Therefore, the presence of Mr. S and Mr. D helped put the participants at ease. In addition, these local authorities also minimize any awkwardness between the researcher and the respondents. However, their role did not affect the originality of the data collected. The researcher was present to establish familiarity with the participants, with the hope of establishing an environment where they did not feel like they were being researched. This allowed for spontaneous, free, and honest responses (Chesebro & Borisoff, 2007).

The study findings were validated for credibility, confirmability, and dependability (Palmer & Bolderston, 2006). Additionally, triangulation was used to compare data from participants, parents, husbands, and supervisors in the field of competence with outcomes (Döringer, 2021). The garnered data were analyzed using Schutz phenomenology by grouping the "in-order-to motive" and "because-motive" used by the child marriage families in interpreting fertility. Then, the data were coded by analyzing the behavior and action patterns of child marriage families related to fertility. Additionally, the statements of each respondent, which were previously triangulated, were analyzed. This analysis involved categorizing the motives or causes of action related to fertility, as well as the expectations about fertility. The conclusions drawn from this coding indicate the understanding of fertility among respondents.

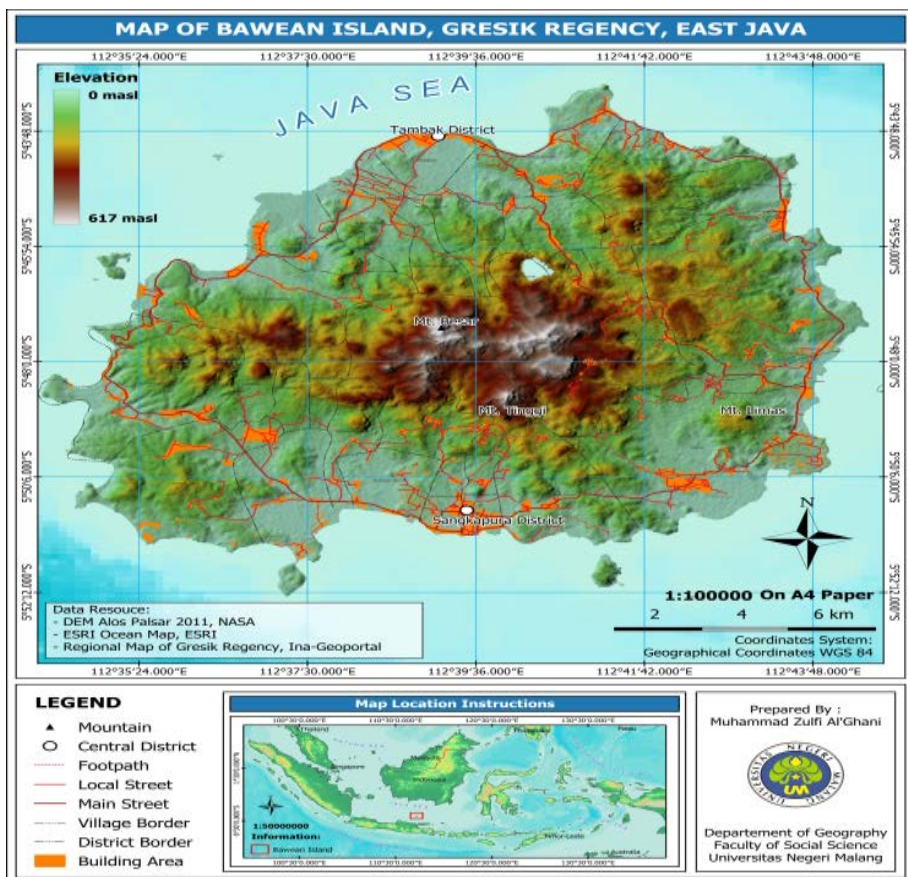
Results

Social Context

Bawean Island is located in the Java Sea, East Java Province, Indonesia. It comprises two sub-districts, namely Sangkapura and Tambak, which account for over 52% of the total area of land use. With only 50% of its population working as farmers, the rest of

its residents choose to migrate due to a lack of sufficient employment opportunities to meet household needs. Among these people, the male population in the dominant 17–45 age group migrates to search for work outside of Bawean Island. Most overseas destinations are neighboring countries, such as Singapore and Malaysia, or other islands (Kalimantan, Java, Sulawesi, or Papua). The economic condition of Bawean Island is classified as lower middle class, with the population’s livelihoods primarily consisting of migrant workers and fishers. The migrant residents are primarily family leaders, unmarried males, or teens. In addition, the high poverty level on Bawean Island is attributed to the fact that the population has only completed elementary and junior high school (Badan Pusat Statistik Kabupaten Gresik, 2021; Susilo, Istiawati, Aliman, & Alghani, 2021). This condition limits their employment opportunity. Therefore, the island’s poverty level remains high, with 9,490 families. Research locations are illustrated on the map in Figure 1.

Figure 1
Map of Bawean Island

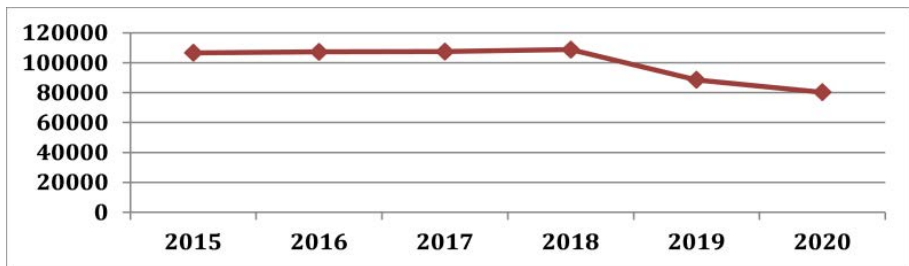


Note. Source: Adapted from Al'Ghani et al. (2024).

In 2018, the total population of Bawean Island was 108,766 people. From 2015 to 2018, Bawean Island's population grew consistently. However, the annual population growth rate from 2018 to 2020 dropped sharply to 19.49% in Sangkapura District and 16.93% in Tambak District (Badan Pusat Statistik Kabupaten Gresik, 2021). The detailed population and the annual increase in child marriage cases of Bawean Island are depicted in Figures 2 and 3.

Figure 2

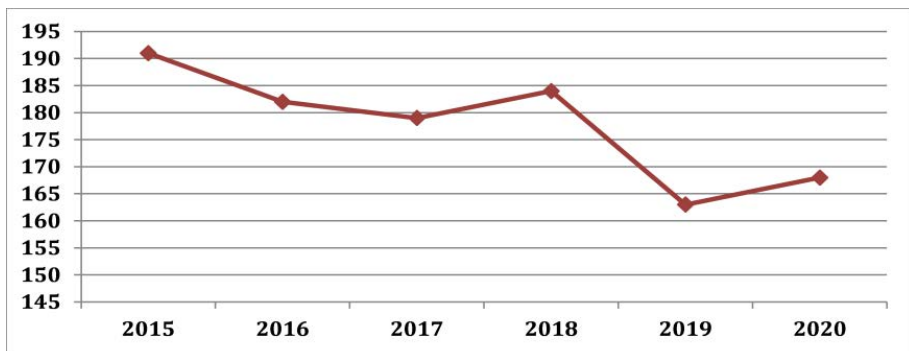
Total Population in Bawean Island



Note. Source: Adapted from Badan Pusat Statistik Kabupaten Gresik (2021).

Figure 3

Child Marriage Cases on Bawean Island



Note. Source: Adapted from Badan Pusat Statistik Kabupaten Gresik (2021).

Findings

The primary objective of marriage is to have children. However, there are different goals associated with the desire to have children, such as the number, gender, age gaps, and even purposeful or unintended delays, with a variety of causes. In this study, we carefully analyzed the codes and categories, followed by the identification of three phenomenological themes from the study. The interpretation of fertility for child marriage families on Bawean Island from the results of in-depth interviews is shown in Tables 2 and 3.

Table 2
Data Analysis Process and Research Findings

Open Coding Sub-Coding	Categorizing		Finding Themes
	The because of-motives	In order to motives	
The husbands of the families engage in early weddings are employed outside of Bawean Island, in other nations around the world.	Feeling lonely	Pleased husband	Fertility as a marriage reinforcement
The young mothers and wives must care for their children by themselves at home	Feeling lonely	–	
Wife who was pregnant	Feeling lonely	Continued progeny	
Wives who were married young and haven't had children	Feeling lonely	Continued progeny	
		Making the family perfect	
Difficulty in caring for children (limited parenting)	Difficulty raising children	–	Fertility as burden
Limitations on delivery's carrying capacity (costs and health facilities)	Poverty	–	
Concerns about their ability to provide for their children's needs in the future	Poverty	Expensive for children's needs	
With only the husband's income, the family has just enough to get by	Poverty	–	
Getting parental inheritance (gardens or rice fields)	Poverty	Working in the field further	Children as an investment
Future desire to be looked for by children	–	Taking care of parents	
Increase family income	Poverty	Increase family income	

Note. Source: Adapted from Al'Ghani et al. (2024).

Table 3
The Interpretation of Child Marriage Families Based on Schutz's Phenomenology Perspectives

Participant	Current Child	The because of-motives	The order to-motives	Interpretation
1	No children yet	Feeling lonely	Continued progeny	Marriage reinforcement
2	1	–	Vontinued progeny	Marriage reinforcement
3	1	Feeling lonely	Making family perfect	Marriage reinforcement
4	1	–	Pleased husband	Marriage reinforcement
5	1	Poverty	Increase family income	Investment
6	1	Poverty	Expensive children's needs	Burden (cost)

Table 3 Continued

Participant	Current Child	The because of-motives	The order to-motives	Interpretation
7	2	Poverty	Increase family income	Investment
8	2	Poverty	–	Burden (cost)
9	1	Poverty	Working further in the fields	Investment
10	1	Difficulty raising children	–	Burden (cost)
11	1	Poverty	Expensive for children's needs	Burden (cost)
12	2	Poverty	Expensive for children's needs	Burden (cost)
13	3	Poverty	Increase family income	Investment
14	1	Poverty	Expensive for children's needs	Burden (cost)
15	Pregnant	Feeling lonely	Continued progeny	Marriage reinforcement
16	No children yet	Feeling lonely	Continued progeny	Marriage reinforcement
17	2	–	Taking care of parents	Investment
18	1	Poverty	Expensive for children's needs	Burden (cost)
19	No children yet	Feeling lonely	Continued progeny	Marriage reinforcement
20	2	Poverty	Increase family income	Investment
21	1	Poverty	Increase family income	Investment
22	1	Feeling lonely	Continued progeny	Marriage reinforcement
23	3	Poverty	Expensive children's needs	Burden (cost)
24	2	Poverty	Increase family income	Investment
25	2	Poverty	Expensive children's needs	Burden (cost)
26	1	Poverty	Increase family income	Investment
27	Pregnant	Feeling lonely	Making family perfect	Marriage reinforcement
28	2	Poverty	Expensive children's needs	Burden (cost)
29	1	Feeling lonely	Making family perfect	Marriage reinforcement
30	1	Feeling lonely	Continued progeny	Marriage reinforcement
31	1	Poverty	Increase family income	Investment
32	1	Difficulty raising children	Expensive children's needs	Burden (cost)
33	1	Poverty	Expensive children's needs	Burden (cost)

Table 3 Continued

Participant	Current Child	The because of-motives	The order to-motives	Interpretation
34	1	Poverty	Expensive children's needs	Burden (cost)
35	1	Poverty	Increase family income	Investment
36	2	Poverty	Expensive children's needs	Burden (cost)
37	1	Poverty	Increase family income	Investment

Note. Source: Adapted from Al’Ghani et al. (2024).

Fertility as a Burden (Cost)

The participants view having children within a family as a burden, although this does not necessarily imply that they do not desire or attempt to have children. The findings indicated a tendency to limit the number of children and the age gap, which could eventually add to the life burden if left unchecked. The burden mentioned by participants remains fundamental, as noted by participants 6, 8, 10, 11, 12, 14, 18, 23, 25, 28, 32, 33, 34, and 36. Participant 8 reported difficulties during childbirth, while participants 6, 10, and 18 expressed the challenges and exhaustion of raising children. Participants 11, 12, 23, 25, 28, 32, 33, 34, and 36 expressed a desire to limit the number of children because they feared they would be unable to support their children’s needs.

During the interview, Participant 8, a homemaker, revealed that she has two children. The participant’s description of the complicated birth process for both children sheds light on the perception of children as a burden. Further, Participant 8 also revealed that the delivery she was dealing with was not a natural process but a Caesar section. As a result, she had to undergo the procedure outside of Bawean Island Hospital, delivering her two children at Gresik City Regional General Hospital. This was due to the unavailability of health facilities, particularly those for Caesarean deliveries, on Bawean Island. The distance between Bawean Island and the Regional General Hospital (RSUD) of Gresik Regency is approximately 100 km. This significant distance is crossed by two modes of transportation, the sea and land, with an estimated travel time of more than four hours. This is certainly difficult for a mother during the final minutes of the delivery procedure, as described by the participant in the following excerpt.

Now I have two children. The first is a boy, 5 years old, and the other, a girl, just 2 months old. The distance between the first and second children was 5 years, thanks to the doctor’s recommendation. Both deliveries had to be performed by the Caesar section. The doctor said my physical condition did not allow me to give birth except through the Caesar section. My two children were born by cesarean section at the General Hospital (RSUD) of Gresik, Indonesia because that is the only one that has health coverage programs (BPJS), and the tools are available. (Participant 8; Trans. by Muhammad Zulfi Al’Ghani, Budijanto, Sumarmi, & Singgih Susilo—M. Z. A., B., S., & S. S.)

From her experience with the first child, Participant 8 prepared for the birth of her second child by visiting Gresik City a week prior, accompanied by her husband, requiring her to pay for a week's stay in Gresik City. The study assumed that Participant 8 views fertility as a burden because of the high expense of delivery, accommodation, and transportation costs. Besides, the distance to the location may pose a challenge for pregnant women.

In addition, the interviews with participants 6, 10, and 18 indicated that they viewed fertility as an added expense. The participants married at 16, shortly after completing junior high school. They were instantly blessed with a child during their first year of marriage. As they were still too young to take on the responsibility of childcare, they found it quite challenging. Therefore, the research concluded that the participants viewed fertility as a cost, as shown in the following excerpts.

Caring for children is difficulted, especially for the first child. We are unversed. (Participant 6; Trans. by M. Z. A., B., S., & S. S.)

We limited the number of children because caring for them takes up much of our time. (Participant 10; Trans. by M. Z. A., B., S., & S. S.)

Having a lot of children is very difficult. (Participant 18; Trans. by M. Z. A., B., S., & S. S.)

The interpretation of fertility as a burden (cost) was explored using the interview results of participants 11, 12, 23, 25, 28, 32, 33, 34, and 36, who are peers and classmates in the community. Participants 11 and 12, who are neighbors, interpret fertility as a cost and prefer to limit childbirth. Meanwhile, participants 11, 12, 23, 25, and 33 expressed their concern about their ability to meet their children's needs in the future, particularly in financing their education, as suggested in the following excerpts.

We decided not to have many children. The cost of education is expensive. It's a pity for children if they can't go to high school in this era. (Participant 11; Trans. by M. Z. A., B., S., & S. S.)

My husband and I plan to have only two children because we are worried that we will not be able to meet the need for education, which is getting more and more expensive. My husband and I will feel guilty if we cannot meet the needs of our children, so I decided to have two children. (Participant 12; Trans. by M. Z. A., B., S., & S. S.)

We have been blessed with three children, that's more than enough. All three of them were born relatively close together. It will be a hassle when they go to school together. (Participant 23; Trans. by M. Z. A., B., S., & S. S.)

I plan to have only two children, according to our financial means. (Participant 25; Trans. by M. Z. A., B., S., & S. S.)

My husband and I desire to have two children, following the government program. We hope to provide our family's future prosper. (Participant 33; Trans. by M. Z. A., B., S., & S. S.)

Participants 14, 28, 32, 34, and 36 expressed their concern about their ability to meet their children's current and future daily needs. They perceived these needs to be increasingly expensive, as already described in the following excerpt.

I feel worried about the daily needs that are getting more expensive every day. (Participant 14; Trans. by M. Z. A., B., S., & S. S.)

As a housewife with two children who relies solely on my husband's income, I feel worried about the increasingly expensive daily needs. (Participant 28; Trans. by M. Z. A., B., S., & S. S.)

Although we are blessed with a son, we still feel that in this era, raising a child is very expensive. (Participant 32; Trans. by M. Z. A., B., S., & S. S.)

We are currently blessed with a daughter, two years old. We recognize the financial demands of raising a child. At this time, we are not considering expanding our family and are instead prioritizing the care of our daughter. (Participant 34; Trans. by M. Z. A., B., S., & S. S.)

We have two daughters now and have no plans for more children. The cost of daily necessities and education is high, especially considering the added responsibility of arranging marriages for our daughters. This can be quite expensive. (Participant 36; Trans. by M. Z. A., B., S., & S. S.)

Fertility as a Marriage Reinforcement

Wandering has become a way of life for Bawean men in their productive years due to limited job opportunities on the island. This is the main reason why they leave the island to seek better economic prospects. Similarly, the majority of husbands leave the island to improve their financial status, with 23 out of 27 husbands of the participants in this study working as migrant workers outside the island. On average, these wandering husbands return to their hometown twice a year.

The absence of their husbands often causes the participants to feel lonely. In general, wives want to be present for their kids and be there for them when they are alone despite spending most of their time caring for them. Participants 1, 2, 3, 4, 15, 16, 19, 22, 27, 29, and 30 view their child as a friend at home due to their husband's absence. Participants 1, 2, and 3 remain friends even though their migrant husbands work in the same location and occupation. Meanwhile, participants 15 and 16 are siblings. Participants 2, 22, 29, and 30 felt lonely at home because their husbands worked as migrant workers and interpreted fertility as a marriage reinforcement, as shown in the following excerpts.

I have two brothers. My sister lives at her husband's house, and my mother often goes to Pasuruan Regency to visit my father, who was hospitalized there, while my husband works in Singapore. Currently, they have one child, the daughter is only one year old. In the past, I wanted to have children immediately after marriage so I wouldn't be lonely when my husband left me. (Participant 2; Trans. by M. Z. A., B., S., & S. S.)

My husband works in Malaysia. I'm here with my children. I wouldn't be lonely when my husband left me. (Participant 22; Trans. by M. Z. A., B., S., & S. S.)

Before marrying me, my husband worked in Singapore for several years. After marriage, two years later he went back to work in Singapore. Thankfully, we have been blessed with a child, so it is not lonely when my husband is away working. (Participant 29; Trans. by M. Z. A., B., S., & S. S.)

In my opinion, having children can provide companionship and continue the family line. They can also offer comfort when a spouse is working abroad. (Participant 30; Trans. by M. Z. A., B., S., & S. S.)

Participants 3 and 4 interpret fertility as a marriage reinforcement through a grateful expression, as shown in the following excerpts.

Although we are still blessed with one child, we are already very grateful. (Participant 3; Trans. by M. Z. A., B., S., & S. S.)

We are very grateful to have been blessed with a boy, now three years old, and my husband is also very happy. (Participant 4; Trans. by M. Z. A., B., S., & S. S.)

During the interview, participants 1, 15, 16, 19, and 27 revealed that they did not have children at the time. However, unlike the other four participants, participants 1 and 27 refused to participate in the family planning program, indicating their desire to have children soon. Participant 1 stated that the four participants share a desire to fulfill their husbands' wishes by having children in the near future.

I was married in a year. At the moment, I have not been blessed with children. Therefore, when my husband works, I feel lonely at home. (Participant 1; Trans. by M. Z. A., B., S., & S. S.)

Although I have been married for two years, I must register with the village's family planning program. I truly hope to start a family soon so that my husband will be content. (Participant 15; Trans. by M. Z. A., B., S., & S. S.)

It feels very lonely at home because my husband works in Malaysia. But next year, my husband will come home, he will not work abroad anymore. We are planning to join a pregnancy program. (Participant 16; Trans. by M. Z. A., B., S., & S. S.)

Children are the ones continued progeny, so we really hope that in the near future, we will be blessed with children. (Participant 19; Trans. by M. Z. A., B., S., & S. S.)

I am currently pregnant. After having children, I won't be lonely anymore. (Participant 27; Trans. by M. Z. A., B., S., & S. S.)

Children as an Investment

The 27 participants are from families classified as having low economic status, thereby, they face challenges in fulfilling their needs. Therefore, these participants believed that having children is a future investment. Children as an investment contribute to increasing the family income. In addition, children were considered an investment, ensuring the next generation of bloodline and their parents' future care. For this aspect,

the research specifically analyzed the responses from twelve participants, namely participants 5, 7, 9, 13, 17, 20, 21, 24, 26, 31, 35, and 37.

Participant 7 is the youngest of three female siblings. At the age of 7, Participant 7 was abandoned by her biological father and was subsequently raised by her mother and uncle, who struggled to provide for her basic needs. Her uncle was only able to aid her in enrolling in a junior high school. At the time of the interview, Participant 7 has been blessed with two daughters. This fact describes the participant's desire for a male child due to the family's social and economic situation. The participant hopes that a son will be able to contribute to the family's income, as shown in the below excerpt.

I am the youngest child of three siblings. My sisters are now with their respective husbands. Women are used to being housewives. My family only relies on my mother, who works in the market as a **rencsek** [seasonal] fish trader, and my uncle, who works in Bawean. Finally, my uncle could only send me to junior high school. (Participant 7; Trans. by M. Z. A., B., S., & S. S.)

The concept of investment can also encompass the preservation of family-owned assets. For instance, in an agricultural family, individuals such as participants 5, 9, 13, 24, 26, and 35 may be brought up with this mindset. Participant 9, the eldest of two siblings, expressed her desire to have a son who could take care of the family's rice fields in the future, as described by participant 9 in the following excerpt.

From a young age, we teach our sons to help with work in the fields so that when they grow up, they will be used to this work. (Participant 5; Trans. by M. Z. A., B., S., & S. S.)

Currently, my husband is employed, maintaining my parents' rice farms. I hope to have a boy so that he can assist his father in the fields and continue to care for them. (Participant 9; Trans. by M. Z. A., B., S., & S. S.)

I currently have three children. Two of them are boys. I hope to continue cultivating the family farm. (Participant 13; Trans. by M. Z. A., B., S., & S. S.)

I hope my two sons, when they grow up, can help work in the fields. (Participant 24; Trans. by M. Z. A., B., S., & S. S.)

For us, cultivating agricultural land is a family tradition. We don't want the tradition to break. Even if you work for another job, farming can be a side job. (Participant 26; Trans. by M. Z. A., B., S., & S. S.)

Our family is accustomed to managing agricultural land, even for side jobs, passed down from generation to generation. We have no intention of selling it. My husband and I hope that one day our children can continue this family tradition. (Participant 35; Trans. by M. Z. A., B., S., & S. S.)

In addition, participants 17, 20, 21, 31, and 37 consider children as an investment to ensure the continuity of offspring and the care of parents in the future, as stated in the below excerpt.

If we have children, when we are old, there will be someone to take care of us. (Participant 17; Trans. by M. Z. A., B., S., & S. S.)

I hope that I will always be given good health, even if my children can help take care of us in our old age. (Participant 20; Trans. by M. Z. A., B., S., & S. S.)

Children are a gift that we should be grateful for, and we take good care of them. Later on, it will be our children who take care of us in our old age. (Participant 21; Trans. by M. Z. A., B., S., & S. S.)

In religious teachings, children must also be filial to their parents, including taking care of us later. (Participant 31; Trans. by M. Z. A., B., S., & S. S.)

From a young age, I will teach my children that their duty is to be filial to their parents, to make their parents happy and other good values. (Participant 37; Trans. by M. Z. A., B., S., & S. S.)

Discussion

Fertility as a Burden (Cost)

Participants perceive having children in the family as a burden (cost). This finding contradicts the results of other interpretations identified in this study and other studies, which view children as an investment. It is important to note that this interpretation does not reflect the choice of child-free lifestyles or child marriage families to accept the philosophy of not having children. The decision to be child-free is a well-established life choice that can be based on various factors, including religious beliefs (Caulk, 2021), economic burden, risk, relationship happiness, and psychological health (Blackstone & Stewart, 2012). In several Latin American countries, such as Haiti, Guatemala, Trinidad and Tobago, and Costa Rica, a high level of religiosity affects the level of education and a high contraceptive prevalence rate of women, which negatively affects the decision to have many children (Götmark & Andersson, 2020). The postponement of childbearing is a significant change in the modern family era. In recent decades, the number of couples who refuse to have children has increased dramatically worldwide (Agrillo & Nelini, 2008; Höglund & Hildingsson, 2023).

Child-free topics have gained increased popularity over the years due to a number of factors, including demographic and motivational factors, such as rational decisions, sociological factors, psychological aspects, traditional stereotypes, and psychosocial factors (Blackstone & Stewart, 2012). In contrast to the child-free principle, research from several Latin American countries reports that childlessness is influenced by the role of health and poverty (Castro & Tapia, 2021). Our analysis concludes that no single-child married family has the notion of being child-free. On this island, the decision of a child-married family to continue having children is consensual.

Research has shown that if the husband is the one who decides, he is more likely to agree, whereas if it is the wife's decision, the husband is less likely to agree, and divorce becomes a more likely outcome (Marciano, 1978). While the study findings indicated that fertility is a burden, this view eliminated the possibility of childfree as an individual choice. All individuals stated that they wanted and expected to have children as lineage successors, although some participants in the interview had not

yet been blessed with children. The participants are more concerned with reducing the number of children and the age gap. Besides, families who practice child marriage aim to avoid a bigger burden by restricting the number of children they have and the age gap between them. Larger families may provide less financial support, placing a greater burden on the family head to meet their needs (Hartoyo, 1998). This, further carries a negative influence on child investment (education) (Leibowitz, 1974). Thus, child marriage families can effectively provide children with investing activities (Lampropoulou, 2018). Meanwhile, parents' investment in their children is critical in ensuring their future welfare (Hedges et al., 2016). Parental performance is greatly influenced by socioeconomic status. However, economic factors are not the sole justification for delaying or restricting fertility. Social and health factors can also play a significant role (Condorelli & Demeestere, 2019; Radon et al., 2015).

Fertility as a Marriage Reinforcement

All married couples strive to maintain their relationship until death. To sustain a marriage, commitment is critical for husband and wife, both personally and morally, as dictated by cultural and religious norms (Artina, 2022; Davies, 2011). Reinforcing the marriage bond involves making an effort to spend quality time together. Latinos are believed to have a stronger family network and exhibit greater feelings of loyalty and reciprocity compared to other ethnic groups (Gallo et al., 2009). His assumption of family values is associated with improved psychological well-being (Mogro-Wilson, 2011).

Our analysis results suggest that families engaging in child marriages interpret fertility as strengthening marriage. This is because most (95%) of husbands from child-married families who work in non-agricultural jobs have migrated far from Bawean Island, both domestically and abroad. In a typical year, husbands and wives from families with children return home 2–3 times (around Idul Fitri, Idul Adha, and the end of the year). As a result, the wives from child marriage families experience loneliness at home without their husbands.

On the other hand, having a child at home to accompany the mother can provide comfort and joy. Psychologically, having children at home is valued as pleasure, pride, fun, teaching, friendship, and love received from parents (Fahmi & Pinem, 2018; Hansen, 2012). Among Latino, parental control may be motivated by the desire to spend a lot of time together at home and to instill cultural values such as *familismo* (familyism), *respeto* (respect), and education (moral education) in order to positively impact child development (Halgunseth et al., 2006). Even so, the psychological impact of having children exceeds the economic and social value (Villa et al., 2020). Having children can strengthen the bond between spouses by fostering a commitment to togetherness. However, it is important to note that on Bawean Island, activities within child marriages are often separated by location.

Fertility Interpreted as an Investment

Families engaging in child marriage also define fertility as a potential investment. Therefore, having children equals investing all available resources to profit from the future (Matsai & Raniga, 2021). The benefits gained from having children in child

marriage families motivate future goals, such as contributing to the family's economic source, ensuring the lineage's successor generations, and caring for their parents in the future. Children provide profits and material stability for their parents in their old age. The prevalence of child marriage is largely attributed to the low-income status of the families involved. Additionally, the wives in these families, who are predominantly homemakers, lack economic power.

The economic value of having children is often associated with caring, loving, and accompanying. Intelligent children are anticipated to be able to provide for their parents' future needs. Besides, children are also perceived as the lineage generation's successors. Children are also seen as successors to the lineage of their family and as caretakers for their parents in their old age (Kasnodirahardjo, 2016; Nuutila & Salanterä, 2006). Having children is a long-term investment in well-being (Parker et al., 2019). This supports the argument in child marriage families that view children as investments.

The Suitability of Child Marriage Families to the Government Program

On Bawean Island, families who engage in child marriage primarily view children as a burden. Although it has already been stated, the claim of those who engage in child marriage families does not support the idea of childlessness. Those who engage in child marriage want and anticipate having children as the line's future heirs, although some participants at the time of the interview have not been blessed with children. Couples who marry as children but have not yet had children do not qualify as supporters of family planning. Like those who have children, the majority of couples adopt family planning practices to reduce the number of children and their geographical spread.

The presented outcome is unforeseen, as it contradicts the main hypothesis that child marriage has a significant impact on fertility. This hypothesis was based on the assumption that child marriage provides a longer reproductive time and thus increases the chances of fertility contributions (Ondiba & Matsui, 2019). However, further analysis has revealed additional factors, such as the difficulty of socioeconomic access, which have led to a better understanding of the situation. This choice is easy to defend, considering the affordability of the location, job availability, and increasing economic demands.

The paper presents findings related to significant issues. Specifically, we address several anomalies, including the large age difference between husbands and wives in child marriage families. The average age of wives in these families is 16 years old, while husbands are 30 years old at the time of marriage. This age difference constitutes child exploitation and is considered child abuse from a legal perspective (Rumble et al., 2020; Wismayanti et al., 2019). Second, the data shows that although the prevalence of child marriage tends to increase annually, the annual growth rate has significantly decreased over the past three years, reaching -18.21% (Badan Pusat Statistik Kabupaten Gresik, 2021). This indicates the success of Indonesia's family planning program (Utomo et al., 2021).

In many Latin American countries, such as Chile, Colombia, Costa Rica, and Mexico, family planning activities, policies, or programs were initiated and expanded in the 1960s and 1970s. These initiatives have marked success in recent years (Götmark & Andersson, 2020). Although Brazil does not have a formal family planning program, certain related services have been incorporated into the national maternal and child health program in recognition of the right of individuals and couples to access family planning and reproductive health information and supplies (Leite & Gupta, 2007). Brazil faced a long period of lack of population information regarding contraceptive behavior, especially regarding the broader availability of contraceptive methods (da Silva-Filho et al., 2022). Furthermore, reports indicate that in Brazil, the leading causes of mortality among women of reproductive age per 100,000 are neoplasms (25.34), diseases of the circulatory system (20.15), external causes (18.69), infectious and parasitic conditions (8.79), and respiratory system diseases (6.37) (Albert et al., 2023).

Third, the understanding of child marriage offenders should consider the age gap and number of children. On the other hand, it is necessary to prevent the occurrence of child marriage by motivating and financially supporting women to complete their studies. Contrarily, the readiness of child marriage offenders to adopt family planning and participate in the village-level family planning program has little effect on the pace of population growth. This is because individuals must be informed or understand how to interpret fertility. Regulating marriage by law, regardless of educational and economic reach, is far less effective.

Conclusion

The study results show that fertility is interpreted in three ways among families engaging in child marriage in Bawean Island: as a burden (cost), as a means to strengthen marriage, and investment. The interpretation of fertility as a burden contradicts the views of child-free individuals who choose not to have children. All study participants reported that they intended to have children. Families who practice child marriage aim to regulate the number of children they have and the age gap between them to avoid the economic burden. In these families, fertility is considered crucial for maintaining the marriage. The expectation is that having children will bring comfort and happiness to mothers at home and strengthen marital ties through a commitment to togetherness. This is particularly true for child marriage families on Bawean Island. Fertility is often viewed as an investment, with children expected to provide utilitarian (economic) value by becoming guardians and caregivers for their parents in the future, as well as contributing to family income. Child marriage families often make arrangements to limit the gap between births and the number of children due to economic circumstances. Future research should test the hypothesis that there is no significant relationship between the population growth rate and the increase in child marriage practices on Bawean Island. The success of Indonesia's family planning program has attracted all families, including those who practice child marriage. Additional research is needed to evaluate the effectiveness of the family planning program policies implemented by policymakers.

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ARTICLE

Impact of Abusive Supervision on Innovative Work Behavior in Turkey: Who Is More Affected?

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ABSTRACT

Researchers have focused on the dark side of managers in recent years, wherein studies discuss the effects of abusive supervision styles on employees and organizations. This research aims to elucidate the influence of abusive supervision on innovative work behaviors of new and former employees. The study focuses on two different employee characteristics. The first group includes the employees with a two-year or less tenure. The second group includes employees with a five-year or more tenure. A simple random sampling technique is used to determine the sample. The research sample includes 345 employees in a manufacturing firm in Istanbul, Turkey. According to regression analysis results, abusive supervision negatively affects innovative work behavior. In addition, abusive supervision affects the innovative work behaviors of new employees more than those of former employees. The findings are consistent with the social exchange theory, conservation of resources theory, and power approach. The research findings are important in demonstrating how destructive abusive supervision affects new employees. In conclusion, suggestions are presented for companies, managers, and researchers.

KEYWORDS

abusive supervision, innovative work behavior, tenure, white-collar, new and former workers

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Introduction

Most firms gain a competitive advantage via innovative contributions of their employees or managers (Khan et al., 2022). Innovation is the application of new knowledge and ideas (Turgut & Beğenirbaş, 2013). Innovative work behaviors (IWB) are defined as initiating or implementing a difference that provides a new idea, process, job role, product, or added value for a firm (Yuan & Woodman, 2010). Many studies have attempted to determine the factors affecting IWB, considering the importance of innovative business behaviors. Some prominent studies found that the approaches of managers/leaders significantly affect employees' IWB (Afşar & Masood, 2018; Hughes et al., 2018; Khan et al., 2022; Li et al., 2019). A series of leader-management studies determined that positive characteristics of top managers increase employees' IWB (Afşar & Masood, 2018; Khalili, 2016), while negative managerial behaviors might have a detrimental effect on IWB (Han et al., 2017; Lee et al., 2013).

In recent years, abusive supervision (AS) has been frequently discussed in the context of negative managerial behaviors. AS refers to managers' nonphysical bad-mannered behavior toward their subordinates. In other words, it is "subordinates' perceptions of the extent to which supervisors engage in the sustained display of hostile verbal and nonverbal behaviors, excluding physical contact" (Tepper, 2000, p. 178).

According to social exchange theory (SET), employees express negative reactions in response to negative behaviors. For example, employees move away from innovative and citizenship behaviors in the face of abusive behaviors. Thus, they balance a manager's response to negative behaviors (Han et al., 2017; Mackey et al., 2017). In addition, negative managerial behaviors may cause employees to feel their resources are at stake. According to the conservation of resources theory (COR), an employee is expected to protect his resources against a perceived threat (Hobfoll, 1989; 2001). Under the guidance of COR and SET, AS in a firm is expected to reduce employee motivation and force the employee to protect himself; as a result, the employee will keep innovative work ideas to himself (Blau, 1964; Khan et al., 2022). However, the individual characteristics of the employees can cause their behavior in an organization to differ. For example, employees' exposure to AS may change since working time is related to an employee's relationships within the organization and the time to gain power (Finkelstein, 1992).

As can be seen in the studies conducted in the organizational behavior literature, features such as working time and experience differentiate employee attitudes and behaviors (e.g., Kavaklı et al., 2009; Pekdemir et al., 2014). Employees with a long working time have more networks and resources than those who work for a short time (Finkelstein, 1992), which can increase the control power of employees over results (Finkelstein & Hambrick, 1990). Regarding working time, the relationship level between AS and IWB may differ. However, no research, to our best knowledge, examines how the levels of being affected by AS and how IWB vary, depending on the working time of the employees in a firm. This shortcoming hinders the detailed examination of the harms of destructive management mechanisms.

Employees' reactions to managerial behavior vary depending on the country. The reason for this difference is typically due to culture, which affects how relations between employees and management occur (Hofstede, 1980; Javidan et al., 2006). Positive leader behaviors are often perceived similarly by employees. However, negative behaviors cannot be generalized to all employees (Kernan et al., 2011; Tsui et al., 2007; Vogel et al., 2015). For example, Vogel et al. (2015) investigated how abusive management behaviors are perceived in Anglo and Asian cultures, i.e., employees from Anglo cultures have a higher sensitivity to abuse than those from Asian cultures. According to a similar study, abusive management significantly affects employees in countries with low power distance (Park et al., 2019).

Culture-based research shows that, in countries with high power distance, the impact of abusive management on employees varies. In cultural research, Turkey is considered a country with high power distance (İlhan & Yemişçi, 2020; Terzi, 2000). However, there is no specific study on how abusive management style affects the innovative behavior of employees in Turkey. Therefore, knowledge about how negative manager behaviors will affect the innovative behavior of Turkish employees remains insufficient; there is also insufficient research on how new and old employees are affected by negative/abusive manager behaviors. Considering how countries are structured, the reactions of new or old employees toward abusive management may differ.

Considering the said deficiency in the literature, the aim of this research was determined as detection of the level of influence of innovative work behaviors of new and former employees from abusive management. Research findings are critical in determining in which contexts AS prevents employees from benefiting more from their innovative abilities. In addition, the findings are important for identifying the level of exposure to negative managerial behavior of new employees who do not yet have sufficient power in the company. Consequently, the fact of new employees not knowing the company well enough could become a factor that increases their intention to leave the company in the face of adversity.

The first part of the research presents a literature review of AS's effect on innovative work behaviors and the importance of working time. After the review, the research hypotheses are presented. The next section provides information about the research method, after which, the researcher's findings are presented. The research ends with a conclusion, discussion, and suggestions.

Relations Between Concepts and Development of Hypothesis

Abusive management describes managers demeaning employees, by displaying humiliating behavior and hostile attitudes while not physically intervening (Tepper, 2000; Tepper et al., 2017). An abusive and humiliating work environment reduces the tendency of employees to feel psychologically safe. The belief that the employee does not work in a safe environment can cause them to protect their resources (Tatlı & Öngel, 2023), thus preventing them from presenting innovative ideas that will benefit the company (Khan et al., 2022). In addition, AS can weaken employees' tendency to innovate by revealing negative emotions (Thajil & Al-Abrow, 2023). The effect of AS

on employees' innovative behavior sometimes occurs indirectly. When the employees' emotional intelligence is high, the innovative behaviors of the abusive management are less affected. On the other hand, low emotional intelligence may cause employees' innovative behaviors to be affected more by AS (Hou et al., 2018).

Abusive supervision can reduce employees' IWB by reducing their proactive nature. At the same time, the high dependence of employees on their managers may lead to further decrease in IWB (Rousseau & Aube, 2018). AS destroys employees' perceptions of justice and negatively affects their management perspectives (Khalid et al., 2018; Tziner et al., 2023). At the same time, the employee's perception of AS damages their psychological contract with the firm and the employee tends to withdraw. This negative perspective prevents the employees from presenting the information for the company's benefit (Pradhan et al., 2020). In summary, AS is expected to prevent innovative work behaviors of employees.

Employees' working hours may cause them to establish social networks with a person through their job descriptions. These networks can take place with people inside or outside an organization, which become sources of information. When this information source provides value for the firm, the individual has power (Barry & Asiedu, 2017; Cross & Parker, 2004; Finkelstein, 1992; Horton et al., 2012; Ibarra & Andrews, 1993; Liebowitz, 2007). Notably, when newcomers experience the process of learning an organization's structure, it takes time for them to gain a central place in its social relations. Accordingly, a newcomer's low level of knowledge prevents them from demonstrating strength within the organization (Rollag, 2004). Therefore, new employees will likely be less resilient than older ones. New employees with less power and resistance are expected to be more likely to hide information, protect resources, or not present innovative ideas when faced with managerial abuse than former employees. Based on this inference, the research hypotheses formed are as follows:

Hypothesis 1 (H₁): Abusive supervision negatively affects employees' innovative work behavior.

Hypothesis 2 (H₂): The negative impact of abusive supervision on innovative work behaviors is higher in new employees than in former employees.

Method

Data Collection

In this research, a questionnaire was used for data collection, which examines the effect of AS on the IWB of employees and the role of working time. The questionnaire consists of three parts. In the first part, the AS scale consisting of 15 items and one dimension was used. The AS scale was developed by Tepper (2000), the Turkish form was developed by Ülbeği et al. (2014). In the second part of the questionnaire, the IWB scale of six items created by Scott and Bruce (1994) was used. The Turkish form of the scale (four items) was prepared by Çalışkan et al. (2019). Finally, five demographic questions (age, gender, educational status, marital status, and length of employment) were included to determine the participants' descriptive characteristics. Data collection took place from February to March 2023.

Sampling Method

The research sample consists of employees in a production company operating in Istanbul. Questionnaire forms were sent to approximately 1,700 employees in the enterprise. Feedback was received for 352 of the questionnaire forms. However, seven questionnaire forms were not filled out properly, making the sample of the study 345. We determined the number of samples, according to Hair et al. (2009), i.e., 10 samples are required for each item included in the research. Reaching 345 samples for the 19 items in the scales (19 x 10 = 190) was considered sufficient. A simple random sampling technique was used in this study. Attention was paid to the fact that all employees in the sample were not involved in upper management. All employees were white-collar office workers. Particular attention was paid to the fact that the participants worked for two years or less and those who worked for five years or more tenure. According to Kavakli et al. (2009), being a new employee (two years or less tenure) or being a former employee (five years or more tenure) affects their behavior in the workplace. Therefore, the study period was divided into two groups.

There are 149 employees with two years or less tenure: 44.3% of participants are men, and 55.7% are women; 53.7% are single, and 46.3% are married; 47.7% are aged 30 and under, 34.9% are between the ages of 31 and 40, and 17.4% are aged 41 and over; 19.5% are in high school or below, 34.2% are associate degree students, and 46.3% have undergraduate and graduate education.

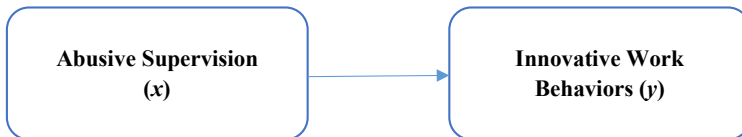
The number of employees who have worked for five years or more is 196: 49.5% of participants are male, and 50.5% are female; 27.6% are single, and 72.4% are married; 7.7% are aged 30 and under, 56.7% are between the ages of 31–40, 29.9% are between the ages of 41–50, and 5.7% are aged 51 and over; 23% are in high school or below, 39.9% have an associate degree, and 37.8% are at undergraduate and graduate levels.

Conceptual Model

The conceptual model of the research is given in Figure 1. The abusive supervision independent (x) and innovative work behaviors represent the dependent variable (y).

Figure 1

Conceptual Model of the Research



Analysis. Factor analysis, reliability analysis, correlation analysis, and regression analysis were performed with the IBM SPSS® Statistics software version 25. Principal component analysis was used to determine the factors. The reliability coefficient was determined by Cronbach’s alpha coefficient. Pearson correlation coefficients were used to determine the relationships. Simple linear regression analysis was used to assess the effect of the independent variable on the dependent variable.

Results

This section discusses the research findings, which examine the effect of AS perception on the IWB of new and former employees. It also presents factor and reliability analysis, correlation and descriptive statistics, and regression analysis results.

Factor Analysis Results

According to Hair et al. (2009), the Kaiser–Meyer–Olkin (KMO) value is 0.60/0.70, the Bartlett sphericity test is $p < .05$, the total variance explained is 60% and above, and the factor loads are 0.40; further, Cronbach's alpha coefficient is .60/.70, which is important to ensure adequate suitability of the measurement tools.

The results of the factor and reliability analyses of the scales of AS and IWB are given in Table 1. The findings proved to be aligned with recommendations of Hair et al. (2009). In addition, there were 15 items in the measurement tool. No items were deleted during factor and reliability analysis.

Table 1

Factor and Reliability Analysis

KMO and Bartlett's Test	Abusive supervision (AS)	Innovation work behavior (IWB)
Kaiser–Meyer–Olkin Measure of Sampling Adequacy	.953	.783
Approx. Chi-Square	4,708.552	1,472.122
Bartlett's Test of Sphericity	df	6.0
Sig (ANOVA)	.000	.000
Variance Explained	65.360%	85.647%
Cronbach's Alpha	.961	.944
Item	15.0	4.0

The finding concerning the IWB scale were also in compliance with recommendations of Hair et al. (2009). There were four items in the IWB measurement tool (Appendix). No items were deleted during factor and reliability analysis.

According to the factor and reliability analysis findings, the AS and IWB scale obtained appropriate values, which can be used in the research. After factor and reliability analysis, findings about correlation analysis and descriptive statistics are included (Table 2).

Correlation Analysis and Descriptive Statistics

Correlation analysis was applied to the relationships between the variables. The following criteria were used in the evaluation of the correlation analysis findings: 0 = *no relationship*; 0.01–0.19 = *very low relationship*; 0.2–0.39 = *low relationship*; 0.4–0.59 = *moderate relationship*; 0.60–0.79 = *high relationship*; 0.80–0.99 = *very high relationship*; 1 = *perfect relationship* (Karahana, 2017; Kocaay et al., 2022). In the evaluation of descriptive statistics, the following criteria were used: 1.00–2.33 = *low*; 2.34–3.66 = *medium*; 3.67–5.00 = *high* (İşcan., 2002). Correlation analysis and descriptive statistics findings are presented in Table 2.

Table 2
Correlation Analysis

	All sample			Two years or less tenure			Five years or more tenure		
	\bar{x}	IWB	AS	\bar{x}	IWB	AS	\bar{x}	IWB	AS
IWB	3.90	1		3.91	1		3.88	1	
AS	1.71	-0.257**	1	1.70	-0.429**	1	1.72	-0.148*	1
	N = 345			N = 149			N = 196		

According to the correlation analysis findings, it was determined that there was a low, negative, and significant relationship at the $p < .05$ level between the AS perceptions of the employees and their IWB. It has been determined that there is a negative and significant relationship at $p < .05$ level between AS perceptions and IWB of employees working in the same company for two years or less tenure. It has been determined that there is a low, negative, and significant relationship at $p < .05$ level between AS perceptions and IWB of those working in the same company for five years or more.

IWB of employees for each category is at a high level, and AS perceptions are at a low level. It is seen that there is no significant difference between the IWB and AS perceptions level of employees with two years or less of tenure and those with five years or more of experience. Although there is no difference between the means, there are significant differences in the relationships between the variables.

Regression Analysis

In the simple regression analysis performed to determine the effect of abusive management perception on IWB of employees, the independent variable (x) is AS, and the dependent variable (y) is IWB. The R^2 value is used for the explanation level, the beta coefficient is used for the explanation coefficient, and the significance level is evaluated at $p < .05$. As a result of the test of the model, the Durbin—Watson value was examined to determine the correlation between the residual values. The fact that the value is less than three indicates no correlation between the residual values (Hair et al., 2009).

Table 3
Regression Analysis

		R^2	Sig (ANOVA)	B	Sig	Durbin–Watson	Hypothesis
All sample	IWB	.066	.000	4.461	0.000	1.73	H ₁ supported
	AS			-0.257	0.000		
Two years or less tenure		R^2	Sig (ANOVA)	B	Sig	Durbin–Watson	
	IWB	.184	.000	4.792	0.000	1.83	H ₂ supported
AS	-0.429			0.000			
Five years or more tenure		R^2	Sig (ANOVA)	B	Sig	Durbin–Watson	
	IWB	.022	.038	4.224	0.000	1.69	
AS	-0.148			0.038			

Table 3 shows the regression analysis results to determine to what extent the IWB of the employees is affected by the AS perception. According to the regression analysis findings, at the level of all participants, the AS approach's level of explaining the IWB of the employees is 6.6%. It was determined that AS negatively affected IWB ($B = -0.257$; $p < .05$). The AS perceptions of the employees working two years or less explain the IWB of the employees at 18.4%.

The explanation coefficient is negative ($B = -0.429$; $p < .05$). The level of explaining IWB of AS perceptions of employees working in the company for five years or more is 2.2%. The explanation coefficient is negative ($B = -0.148$; $p < .05$). According to the findings, H_1 and H_2 are supported.

Conclusion

When the findings are evaluated in general, it is seen that employees are generally negatively affected by AS practices and tend to decrease IWB. New employees (two years or less tenure) are more likely to be affected by AS than old employees (five years or more tenure). That is, when exposed to abusive behaviors, the IWB of new employees decreases at a higher level than that of former employees.

It is possible to state that our research findings are compatible with the assumptions of SET, COR, and power approaches. The theories mentioned above support the decrease in the tendency of new employees to engage in innovative behaviors in return for abusive supervision and the fact that former employees are relatively less affected by abusive supervision. The time they are in the organization strengthens them (Finkelstein, 1992) and makes them more resistant to abusive behaviors (Mackey, 2017; Liang et al., 2022). On the other hand, since new employees have fewer resources and power (Mackey, 2017), they become more vulnerable to abusive behavior. Low-powered employees may avoid IWB because their resources are threatened with depletion and need a positive exchange process with management (Cook et al., 2013; Emerson, 1962; Hobfoll et al., 1990; Hobfoll & Lilly, 1993).

New employees can be considered human resources, providing creativity and innovation energy for companies. However, exposure of new employees to AS will prevent them from using their intention to continue in the workplace and their intellectual capital for the firm. Thus, a negative result will arise, such as companies being unable to sufficiently benefit from their new personnel. The firm's competitive advantage may suffer significantly because human resources are an important element of competitive advantage (Barney, 1991; 2001; Bayraktarođlu et al., 2019; Clarke et al., 2011; Ge, Xu, 2021). In addition, finding and training new employees to replace those who will leave may create a significant cost for companies (Palanski et al., 2014).

More importantly, AS reduces employee well-being (Lin et al., 2013) and increases silence (Morsch et al., 2020). Preventing the damage caused by AS to the psychological integrity of the employees (Bowling & Michel, 2011; Liang et al., 2022) is at least as important as the firm's performance. It is important that problems such as

AS, which are unethical and cause a decrease in employee welfare, are eliminated for all old/new employees.

Considering the harms of AS, abusive supervision behaviors should be minimized in organizations. Since top management usually carries out AS, employees should also know the need to reduce AS. For example, developing social relationships with managers (Jiang et al., 2022) can help keep relationships cordial; thus, AS behaviors may decrease. Another suggestion is about subordinates' sense of humor. The fact that the subordinates' sense of humor is developed reduces the negative behaviors of abusive managers (Huang et al., 2022).

Managers are responsible for reducing AS. Managers' awareness of unethical behaviors and abuse should be developed (Harris et al., 2013) and trained in order to reduce conscious or unconscious abusive behaviors. If the entire management team is not abusive, creating a positive organizational climate that will provide sensitivity and awareness for employees (Feng & Wang, 2019) can reduce AS behaviors. In addition, as a deterrent option, the abused and the eyewitnesses can speak out against abusive behavior (Frey et al., 2009), which may reduce AS behaviors. It is recommended to create 360-degree feedback and zero-tolerance (Decoster et al., 2013; Tepper, 2007) programs so that employees can raise their voices or file a report.

Many studies have demonstrated the effect of AS on the innovation and creativity of employees. Although important results were obtained for some new and former employees in our research, the research should be improved in some respects. For example, this research regarding new and old employees needs to better focus on the kinds of networks available for new employees. New employees may also oppose AS, as social network ties are a source of strength for individuals (Zagenczyk et al., 2015). It is recommended to identify how important social network ties of employees reduce AS, as it may be notable for IWB. Abusive management work is mostly carried out based on the opinions of subordinates. Although the manager's behavior is not abusive, an employee may perceive it as abusive.

For this reason, managers and employees should be examined together. Finally, investigating how AS affects IWB in high power distance societies could reveal important findings. Examining conflicts between managers with high power desire (Lin et al., 2013; Wang et al., 2012) and employees with low power distance desire is recommended. This research was conducted in Turkey with white-collar employees. In the research, Turkey is considered a country with high power distance and that employees have a high tolerance for abusive supervision. Although the high tolerance of former employees to abusive behavior is a result of cultural norms, for future studies, it is recommended to examine the overall effect of culture in this area.

How AS affects employees' IWB has yet to be examined with the new/old employee distinction. In addition, we needed to find clear information in the literature about how new and former employees are affected by AS. Our research is unique, however, in showing how new and former employees respond to AS.

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Appendix

IWB Scale Items

- I generate new ideas about my work.
- I make an effort to implement new ideas regarding my work.
- I always find a better way to do things.
- I create better processes and routines for how my work is done.



ARTICLE

Between Crypto Art and Copyright: NFT Tokens as Tools for Confirming the Authenticity of Art Objects

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ABSTRACT

The symbiosis of blockchain technology with human creativity has given rise to what we now call crypto art, marking a new frontier in digital artistic expression. This development has profoundly altered our understanding of digital artifacts and ownership in this domain. Once easily accessible to all, digital art poses a unique challenge in the realm of collecting: how does one collect something that can be effortlessly replicated and shared? This paper explores the role of non-fungible tokens (NFTs) as authentication mechanisms and proof of authorship for digital artworks. Initially designed for decentralized financial transactions, blockchain technology has become instrumental in validating authorship and enabling the monetization of digital artworks through NFTs. Although digital artists now benefit from the validation of their work as legitimate investment assets through NFT technology, challenges persist due to the absence of copyright verification during token creation. For example, many artists have discovered their creations being used by third parties to mint tokens without their consent. The study demonstrates the transformative impact of NFTs on the digital art landscape while addressing the ongoing challenges and the imperative for enhanced copyright protection mechanisms.

KEYWORDS

crypto art, copyright, NFT, nonfungible token, digital art, authenticity problem, blockchain

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Introduction

The evolution of art has always entailed the exploration of new forms of artistic expression, and crypto art has become a pioneering direction in digital art, particularly in the realm of exclusive ownership of digital objects. Enabled by blockchain technology, non-fungible tokens (NFTs) serve as unique cryptographic records linked to specific digital files, functioning as tools for verifying the authenticity of artwork. Through an examination of the components of crypto art and the challenges inherent in verifying the authenticity and authorship of digital artworks, NFTs have emerged as pivotal tools for confirming authorship.

However, non-fungible token technology does not involve copyright verification when creating tokens. “The technology can also complicate these same issues—most notably copyright issues—especially with existing artworks not created with NFTs” (von Schlenhenried, 2022). This means that cases have occurred where authors have discovered their work being used by third parties to issue tokens without their knowledge or permission. In our article, we are going to explore how traditional art paradigm shifts into digital with NFTs.

To understand how ownership is established in crypto art through NFTs, we need to delve into the realm of decentralized exchange protocols. In order to distinguish a unique work amidst the vastness of the Internet, we should assign it a distinctive characteristic, for example, a serial number. Subsequently, a technology is required to facilitate the input, storage, and validation of this identifier. The inception of blockchain technology in 2008 marked a pivotal moment for digital art, as it laid the groundwork for the emergence of NFTs within its ecosystem (Trubina, 2022).

Blockchain, which is essentially a chain of interconnected blocks, operates on a strict chronological order akin to the pages of an endless book. Each block contains records of preceding transactions, resulting in an incremental accumulation of data with each subsequent block. These blocks are linked together via cryptographic signatures, ensuring the system’s security through data encryption. Any alteration to the system triggers a cascade effect, with the cryptographic signature propagating the information across all connected blocks.

In an open blockchain, tokens can typically be interchanged with identical counterparts, rendering them fungible and equivalent. In contrast, non-fungible tokens have a unique identifier that is immutably recorded in the blockchain database. This distinctive feature prohibits the token from being replaced or exchanged, as implied

by their name. NFTs can be associated with tangible or digital assets, spanning audio files, photographs, images, or even in-game items. Developers often liken them to digital collectible cards, emphasizing that their value lies not in the token itself but in what it attests to. Basically, any dataset, such as an image, can be linked to a token through a cryptographic signature on the blockchain. NFT serves as a cryptographic seal affirming ownership and integrity in the database.

In analyzing the market for NFTs, Calvo (2024) delineates three primary perspectives: “those who believe it is a new bubble, those who think it is a revolution, and those who think the idea has failed”. The debate hinges on whether the NFT market represents an economic bubble or a transformative opportunity. According to Calvo, voices in the cryptoart community, such as cryptoartist Beeple and cryptoinvestor Sundaresan, lean towards the former viewpoint, arguing that “it is an economic bubble with a clear negative prognosis in the short and medium term” (Calvo, 2024).

This study investigates the pivotal role of NFTs in resolving authentication challenges in the realm of crypto art and addressing broader trust issues in the digital sphere. Throughout the article, we delve into specific instances in the crypto art business to shed light on NFTs’ impact on both crypto art and gaming. To provide a comprehensive understanding, we explore various dimensions: the origins and evolution of crypto art; the challenges associated with collecting and investing in crypto art, in particular how NFTs help alleviate these concerns; and, finally, the legal and copyright-related aspects of crypto art.

The Origins and Development of Crypto Art

The research problem related to NFTs revolves around the essential need to authenticate artworks in the digital domain. In an era of boundless Internet access, discerning between a copy and an original proves challenging. When we duplicate an electronic artwork, we obtain a replica. In the digital realm, the distinction between the copy and the original blurs since they are indistinguishably identical. However, the scenario shifts if we turn to fine art, where the copy is inherently distinct from the original. This challenge finds resolution in the tool of digital art authorship verification, notably through asset tokenization via NFTs.

NFTs can look completely different (NFT uses will be described below), but most often a token is a metadata file with information encoded in a digital version of a tokenized work. Marketplaces are online platforms where an NFT may be stored and displayed (von Schlenhenried, 2022).

We will refer to works of fine art to which NFTs have been assigned as crypto art. The term “crypto art” is most often used exclusively in relation to digital art since the fact of confirmation through a unique token puts the digital object of intellectual activity on the same value level as the physical object of intellectual activity. However, digitized renditions of physical artworks, tokenized and offered for sale, can also fall under the category of crypto art. Calvo emphasized the significance of this phenomenon, stating that

the emergence of what is known as cryptoart or cryptographic digital art is particularly important. This is a trend based on the idea of non-fungible tokens

(NFTs), smart contracts, and cryptocurrencies, which, according to its advocates, guarantees the ownership, authenticity, scarcity, exclusiveness, immutability, verifiability, and traceability of digital works. (Calvo, 2024).

It should be noted that while crypto art falls under the umbrella of digital art, not all digital art qualifies as crypto art. The application of blockchain technology in art transactions predates the advent of ERC-721 smart contracts. In 2013, the sale of Kuno Goda's artwork *200 Bitcoins* marked one of the earliest instances of blockchain-based transactions (Hern, 2014). Although the transaction was conducted in bitcoins, it lacked a token confirming ownership, thus not fully qualifying as crypto art. Notably, the painting *200 Bitcoins* was a tangible object, not a digital one. Therefore, only digital objects paired with non-fungible tokens are considered crypto art (Trubina, 2022).

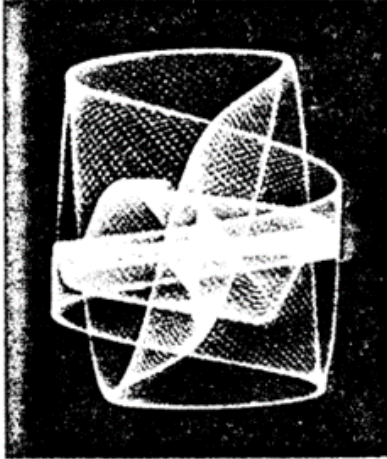
In this paper, digital art is understood as an art direction based on the use of computer programs and technologies, resulting in digital representations of art. This includes not only internet-based objects but also multimedia exhibitions, sculptures crafted using computer technology, and immersive technologies such as VR/AR (Virtual Reality/Augmented Reality), all of which complement traditional art forms.

The origins of computer-generated graphics go back to the pioneering work of mathematician and artist Ben Laposky in 1953. Laposky used an oscilloscope as his canvas, crafting abstract art through the manipulation of electronic waves displayed on a fluorescent screen (Figure 1). His creations were immortalized through photography (Laposky, 1969).

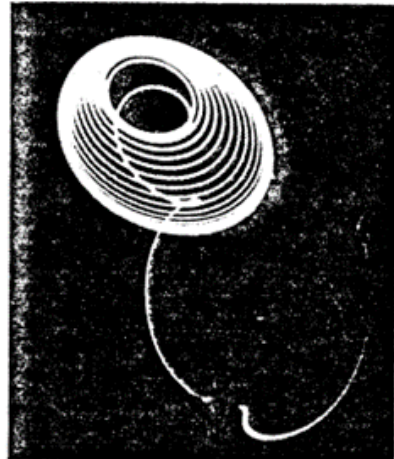
Another significant sphere of digital art is software art, also known as generative art. Michael Noll, a researcher at Bell Laboratories, stands as an early proponent, showcasing his algorithmically generated artwork, including *Gauss Quadrature*, at the 1965 *Computer Images* exhibition in New York (Noll, 1967). Noll envisioned computers not merely as tools but as active creative partners, offering new avenues for artistic expression. Artists in this realm often assume the role of programmers, leveraging software capabilities to explore novel forms of expression, from generative fractal art to interactive geometries responsive to sound and movement.

With the advent of the Internet, the net.art direction developed, with many different projects, one of which is *Starrynight*. This initiative served as an artistic interface for the curated online archive of the Rhizome email discussion list, a pivotal platform for artists exploring new media forms in the late 1990s. Every week selected messages from the list, including critical messages, exchange of resources and information, as well as illustrations in the form of e-mail, were archived, which was called Textbase. *Starrynight* transformed archived emails into luminous points on a dark backdrop, creating "constellations" that users could navigate, illuminating connections between related messages (Galloway et al., 1999).

Today, artificial intelligence opens new horizons for artistic creation, enabling the generation of unique images, music, and more. Artists harness neural networks to produce works evocative of styles pioneered by renowned artists like Salvador Dali or Claude Monet. This realm, referred to as algorithmic art, empowers users to become "co-authors" of algorithms, shaping artistic outputs with a simple click (Trubina, 2022).

Figure 1*Oscillons: Electronic Abstractions*

19



36



3



46

Note. Source: Laposky (1969).

Confirming the Authenticity of Digital Art

In order to authenticate digital art, it is necessary to verify the unique digital signatures associated with the original works, rather than the outward appearance of the artworks themselves. These signatures, represented NFTs, serve as programmable digital units of value recorded in a digital registry. They are integral to confirming authorship and ensuring the authenticity of digital art objects.

Paul (2015) highlights the challenges of collecting, storing, and verifying digital art objects, which encompass various styles and trends: unlike traditional object-oriented works that museums are equipped to handle, interactive digital artifacts

pose distinct challenges due to their temporal nature. While displaying digital objects is feasible through screens, projections, and virtual reality, issues of collecting and establishing authorship remain complex, especially considering the widespread accessibility of the internet.

In 2021, the introduction of NFTs revolutionized the world of digital art by enabling artists to secure authorship rights and receive financial support for their works. This marked a significant shift, as previously, digital art had been auctioned in the absence of such mechanisms. For instance, Tauba Auerbach's *Untitled (Fold)* was sold for £386,500 at a Phillips auction in 2013. However, it was the sale of Beeple's collage *500 Days* at Christie's auction in March 2021 for \$69.5 million that sparked widespread interest and propelled the rapid growth of the NFT market (Brown, 2021). With the introduction of smart contracts, NFTs can now verify ownership of digital objects, legitimizing digital art as a viable investment option and facilitating the sale and collection of virtual artworks.

The Use of NFTs in the Gaming Industry

Initially, NFTs were conceptualized as a means to confirm ownership of in-game assets, particularly attributes of characters in computer games. These non-fungible tokens adhere to various standards. For instance, games often utilize the ERC-988 token, enabling the creation of a "package" containing character attributes that can be traded in the game. Essentially, this token serves as a validation for other tokens.

The ERC-721 token standard was first used in the *Cryptokitties* game in 2017¹. The developers have offered the possibility of generating a unique character, that is a crypto bot. The speculative mechanics of a smart contract offers the user to sell a cat, generate a new one, or engage in "breeding cats." This process involves selecting two NFTs, which then undergo a "crossing" to produce offspring of varying degrees of rarity.

Later, there appeared games based on the "hot potato" principle. In the traditional children's game of the same name, participants form a circle and swiftly pass a ball while music plays, when the music stops, the holder of the ball is declared the loser. In January 2018, a game titled *Crypto Celebrities* was launched, where users sequentially purchased NFTs, i.e., digital cards featuring images of famous personalities. The premise was simple: if demand existed for a specific celebrity card, both the initial buyer and subsequent purchasers made a profit. However, if a user happened to be the final purchaser of a card, they would incur a loss².

Popular games incorporating non-interchangeable tokens are currently categorized into two main types based on their mechanics: "play to earn" and "move to earn." "Play to earn" encompasses traditional computer games where success is primarily dependent on the time spent in the game. On the other hand, "move to earn" introduces an element of beneficial physical activity, which has gained significant popularity among users. STEPn is one such popular "move to earn" game³. To

¹ <https://www.cryptokitties.co/>

² <https://cryptocelebrities.org/>

³ <https://stepn.com/>

participate in the game, you need to buy NFT sneakers, and take a certain number of steps every day, thereby earning cryptocurrency. The amount of energy depends on the category of sneakers (the more expensive the sneakers, the more energy), which allows you to receive tokens during physical exertion, but when the energy runs out, you need to wait for its recovery.

NFT games have surged in popularity, attracting increased investment in this sector. Furthermore, non-fungible tokens have attracted much attention and have been adopted by fashion brands—the process facilitated by the concept of the metaverse. The *metaverse*, a virtual space that relies on digital technologies like VR/AR, offers immersive experiences with user-driven values, economies, goods, and services. NFTs serve as connectors across various domains, enabling collaborations between clothing brands and game developers to introduce virtual representations of their products. For instance, Louis Vuitton company launched *Louis the Game*, a puzzle game commemorating the fashion house's 200th anniversary. Players explore different locations, delve into the fashion house's history, and have the chance to discover one of the 30 collectible NFTs by digital artist Beeple. These NFTs can be traded on various platforms, providing users with verified ownership and the autonomy to buy and sell digital goods as they see fit (Northman, 2021). This aspect stands as a primary catalyst for the metaverse and the user-owned meta-economy.

The Use of NFTs for Collecting

In the subsequent phase, NFT tokens saw significant integration into the art realm. From 2015 to 2018, developers primarily emphasized the culture of collecting rather than the artistic integrity of works. Crypto art bore resemblance to the popular basketball cards of the 1990s. It should be noted that much of crypto art is collectible, akin to amassing either comic cards or pieces by renowned digital artists.

Rare Pepes⁴ cards with a frog became one of the brightest representatives of collectible crypto art. Each artist could create their unique rendition of the frog, but only once, thus ensuring the exclusivity of the cards. Another notable collectible token series is CryptoPunks. While Rare Pepes were issued on the Bitcoin blockchain, CryptoPunks were tokenized on Ethereum. It is important to note that determining the exact value of any mentioned tokens is extremely difficult due to the volatility of cryptocurrency exchange rates.

Full-fledged tokenized digital art platforms, such as MakersPlace⁵ and R.A.R.E. Art Lab⁶, appeared in 2018–2019. Then, for the first time, artists had the opportunity to publish their works and get acquainted with the new world of digital art. During that period, there was active interaction between the community of artists and the blockchain. The Digital Art Chain social network emerged, simplifying the process of obtaining a non-fungible token: users could create a token from any digital image they

⁴ <https://rarepepes.com/>

⁵ <https://makersplace.com/>

⁶ <https://www.lagelnd.com/rare>

uploaded. Later, the OpenSea platform⁷ created a simple program for creating a smart contract and NFT.

As of today, there are numerous platforms specializing in NFT production, such as Rare or SuperRare.

The first person to embark on the “tokenization” trend in Russia was the calligrapher Pokras Lampas. He created an NFT that represents a hybrid of traditional and digital art. Initially, the artist painted the original work on canvas, which was later digitized. Subsequently, the image was projected onto the concrete structures of the Chirkey hydroelectric power station, which is the largest in the North Caucasus (Figure 2). The photograph of the projection was tokenized and made available for sale. It is important to note that the token purchased for \$29 thousand does not represent the art object itself, but rather its photograph.

Figure 2
Transition



Note. Source: Pokras Lampas prodal foto (2021).

⁷ <https://opensea.io/>

It is also possible to tokenize a photo or video of a physical art object and subsequently destroy the original. This was demonstrated by the blockchain company Injective Protocol, which purchased one of 650 copies of Banksy's work titled *Morons (White)* for \$95 thousand. During a live broadcast, the physical artwork was burned, and the video recording of the event was transformed into an NFT and put up for sale (Boucher, 2021).

Almost anything can be linked to a token. In 2021, the source code of the Internet was auctioned at Sotheby's (This changed everything, 2021). The lot contained a collection of four different objects represented as a single NFT. It included "source files with timestamps" of the Internet source code, an animated visualization of this code, notes from the creator of the World Wide Web, Sir Tim Berners-Lee, detailing the process of writing the code, and a digital poster created by the author. Overall, the files amounted to nearly 100 thousand lines of code.

Not only artists but also musicians issue non-fungible tokens. One of the most notable cases is the digital works of the Canadian singer Grimes (Kastrenakes, 2021). To purchase the video titled *Death of the Old*, potential buyers had to register on the Nifty Gateway platform and submit a request for the lot within a limited time, offering their price for the work. There are several interesting points in this story that require special attention. Two videos were sold not as single copies, but in an edition of 700 copies each, which raises the question: why pay substantial sums for something that several hundred more people also acquire? The explanation lies in the fact that by purchasing a token, one becomes part of a community of individuals who also own the same token, some sort of an exclusive club accessible only by invitation.

NFTs are revolutionizing the landscape of digital art, breaking down traditional boundaries. For instance, artists now have the ability to sell animated pictures with audio accompaniment. In his debut NFT project titled *On the Nature of Sound*, artist Jesse Woolston showcased an audiovisual digital creation, using artificial intelligence, computing, environmental design, and musical composition to craft a collection of "biomes" (Moret, 2021). The drawings and animation techniques employed for each biome incorporate physical simulations. The sculptures accentuate specific colors to elucidate how our perception of the environment is influenced by color. Textured wave patterns within each sculpture move seamlessly in a 30-second endless loop, accompanied by a soundtrack. This amalgamation of mathematical algorithms, animation, and audio forms a captivating artistic experience.

The artistic value inherent in digital works matches that of physical ones. These creations transcend mere images on the Internet, evolving into immersive performances crafted by authors leveraging modern computer technology. Thus, the significance and scale of digital art expand through crypto art and NFTs, marking a new era that intertwines art and technology.

Crypto art further blurs the boundaries between realities, enabling the connection of NFT tokens with tangible objects. In March 2022, American artist Jeff Koons announced the launch of his inaugural NFT project titled *Jeff Koons: Phases of the Moon* (Grush, 2022). Inspired by humanity's technological advancements and enduring fascination with the moon, the series comprises unique NFTs, each corresponding to

a physical sculpture. These sculptures will eventually be sent to the Moon, becoming the first authorized works of art on the lunar surface.

There is an abundance of such examples as artists continue to explore this novel direction. The shift from displaying works on the Internet to creating digital art, establishing official ownership, and profiting from sales marks a significant change in the art world.

Consequently, museums and galleries worldwide have taken an interest in NFTs. The Uffizi Gallery in Florence, Italy, became one of the first major institutions to utilize non-fungible tokens (Solomon, 2021). Seeking to recoup revenue losses incurred during the COVID-19 pandemic, the gallery digitized and sold NFT images of some of its iconic works. In May 2021, the gallery sold its first tokenized painting by Michelangelo, *Doni Tondo*. Later that year, the Hermitage hosted Russia's inaugural NFT exhibition, *Invisible Ether*⁸. The main idea was the lack of physical counterparts to the museum's exhibits. As a solution, a dedicated website featuring a catalog and a virtual gallery was established for the project. The exhibition comprised 38 exhibits, each representing various phenomena.

NFT works can be exhibited both in physical spaces through screens and projectors, as demonstrated by Russia's first NFT gallery ZAVTRA in Moscow. Digital artist Ruslan Vyaltsev commented on the significance of the gallery:

For a while in Russia, the NFT community was fragmented, but now we're witnessing the rapid expansion of NFT into the international market. Today, artists have the chance to gather here at ZAVTRA. This is valuable not only because, unlike traditional art, in digital art, an artist can track the resale and movement of their creations, but also because this space is where a unified NFT community is emerging, offering every artist the opportunity to gain visibility. (Studiia novykh media, 2022)

NFT works are predominantly exhibited in virtual galleries. In 2018, the Cryptovoxels project introduced a straightforward WebVR interface (Peaster, 2020). In this virtual world, users can design interiors and exteriors and showcase their NFT paintings. While VR functionality is currently limited, obtaining land in the virtual realm is straightforward: users can purchase land, construct galleries, and display tokenized collections. Cryptovoxels was among the pioneering virtual galleries to offer a platform for exhibiting NFTs in a virtual environment. Currently, there are many such galleries, including Terra Virtua. However, the latter primarily caters to collectors rather than artists, offering a few customizable virtual spaces for showcasing NFT digital collections.

Investing and Crypto Art

Crypto art offers undeniable investment opportunities. Like traditional art, the value of crypto art depends on authentication. While traditional art's authenticity can be confirmed through examination, digital art relies on the presence of an NFT token. NFTs

⁸ <https://celestialhermitage.ru> (currently unavailable).

have revolutionized perceptions of digital art and ownership rights by guaranteeing security and transparency in transactions.

In the traditional art market, purchasing a painting grants ownership of the physical object. To sell an original work, it must be transferred directly to the buyer, safeguarding it from third-party access unless authorized by the copyright holder. In contrast, digital art operates differently: following a sale, digital copies remain in circulation, accessible to anyone. Essentially, NFTs have elevated the digital art market to an enhanced iteration of the traditional model. Upon purchasing a digital painting, ownership of the original is obtained, with all transaction details recorded on the blockchain while copies of the painting can still be freely accessible.

The capitalization of the crypto art market since its inception amounts to \$2.5 billion, according to Cryptoart.io (rchen8, 2020). Franceschet (2021) highlights increased interest in digital art and NFTs, noting that “crypto art market went parabolic in late 2020—also because of the COVID pandemic and the consequent digitalization of our lives—attracting the attention of major mass media and major auction houses” (p. 311).

Until recently, the value of digital art was debatable due to the potential for endless copying of online works. As Francesco De Carlo (2020) observes,

it was generally believed that digital works of art have really limited economic value due to their easy reproducibility ... if no technological protection measures are applied to prevent reproduction, users, instead of buying works of art from their authors, simply create a copy, committing copyright infringement, being confident that this will go unpunished. (p. 155)

The potential for profit directly correlates with the copyright of the works. With an NFT, ownership rights can be transferred, thereby establishing the investment value of crypto art. For creators, NFTs offer an avenue to monetize their work. Through smart contracts, artists receive a percentage from each resale of their work, with platforms typically offering deductions ranging from 5% to 25% for each transaction.

However, while NFTs offer incentives to creators of art, they do not protect their works from free downloads or resolve copyright issues. Visiting any NFT platform⁹ reveals that images for sale can be easily downloaded. Platforms are increasingly seeking to safeguard auctioned paintings, yet the most significant advantage of NFTs and smart contracts lies in the hidden content received by the buyer immediately after purchase. For instance, when purchasing an image or video, buyers receive the original in the highest quality along with additional materials and a letter from the author.

⁹ The leading platforms include OpenSea, Rarible, and SuperRare, each catering to different levels of works and user demographics. OpenSea (<https://opensea.io/>), being the largest platform, is considered the most accessible but faces challenges with pricing and work authenticity. Rarible (<https://rarible.com/>), a primary competitor to OpenSea, allows free NFT creation but charges a commission for removal. SuperRare (<https://superrare.com/>) stands out as a more exclusive platform, showcasing renowned artists and media figures and selling rare works at higher prices. To become an author on SuperRare requires an invitation and selection process. While new platforms continually emerge in the expansive NFT market, OpenSea, Rarible, and SuperRare remain at the forefront.

The difference between owning the original digital artwork and simply acquiring a copy lies in the fact that the former is backed by an NFT. No matter how digital art distances itself from physical art, the rules of ownership are the same. A replica of a Renoir painting will not hold the same value as the original. In the digital realm, purchasing an NFT enables legal selling, gifting of art objects, and earning interest from resales. While copying images from platforms is possible, it can be compared to museum visitors photographing masterpieces, as digital copies lack authentic characteristics and thus have no economic value. Therefore, the value lies in the certificate of authenticity rather than the work itself.

The certificate of ownership is not the sole motivator for collectors to invest in digital art. The investment aspect makes NFTs a valuable tool for resale and speculation, as the value of an artist's works depends on their reputation and presence in the digital sphere. Purchasing works from artists frequently mentioned online can yield profits from subsequent resales. Pricing digital paintings is a complex matter closely tied to various fluctuating factors, including cryptocurrency exchange rates.

The disruptive nature of NFTs raises questions about their role in intellectual property and the potential for shifting copyright law paradigms. As stated by Okonkwo (2021), "NFTs are channels for intellectual property commercialization," underscoring their significance in the digital landscape. This article explores the intersection between NFTs and copyright law.

At this point it should be noted that as of December 2022, the frenzy surrounding NFT art has subsided, but investor and user interest in the market persists.

Insights From a Crypto Art Experiment: Exploring the Fusion of Art and Tech

To gain insight into the crypto art market, Marya Trubina, one of the authors, embarked on her own NFT project. The objective was to examine the opportunities available to digital artists and to assess the challenges faced by newcomers in creating NFTs. For experimentation we chose platform Rarible, which helped us assess pricing dynamics and platform functionalities. A notable observation resulting from the experiment was the significant difficulty encountered by lesser-known artists in generating sales, with established artists and popular collectible tokens commanding the highest values.

The project centered on a niche known as binary art, which incorporates various artistic styles such as GIFs. An innovative approach was adopted whereby the binary code of a literary work was overlaid onto a photograph, transforming zeros and ones into a recognizable image. This technique not only enhances visual appeal but can also imbue the artwork with hidden meanings. To achieve this, the photograph underwent pixelation, each square accommodating a pair of binary digits. Subsequently, these pairs were color-coded to correspond with individual pixels. The resulting synthesis of computer technology (binary code), visual art (photography), and literature (Shakespeare's sonnets) culminated in a GIF-image, thus giving rise to the project's title, *Ciphered Art* (the resulting work is shown in Figure 3).

schemes via NFTs. However, unauthorized creation of NFTs based on original works without the author's consent remains a challenge. Authors often face the burden of proving both their authorship and the link between the token and the work.

Recognition of NFTs in international jurisdictions poses another challenge as they fall under various legal frameworks. While digital rights were incorporated into civil law in Russia in 2019 (O vnesenii izmenenii, 2019), there is currently no specific legal framework governing NFTs. Consequently, the responsibility for safeguarding authors' intellectual property often falls on platforms where NFT art is exhibited.

In most NFT sales, buyers acquire ownership of the digital artwork, while the artist retains exclusive rights to the work. Platforms like SuperRare emphasize the separation between ownership of the copyright and ownership of the tangible or digital asset. Artists typically maintain copyright protection unless explicitly transferred in writing. Collectors hold proprietary interests solely in legally obtained NFTs, without acquiring authorial rights to the underlying artworks.

The owner of the exclusive copyright to the work can grant the other party a license, providing the right to use the work for specified purposes and a specified period. Currently, only art platforms protect the market from the so-called license gaps and fraudulent schemes. License gaps occur when the line of use of exclusive rights to a work becomes blurred. A notable example is the NFT comic *Wonder Woman* by Jose Delbo, exhibited on an NFT platform during the pandemic. In spring 2021, amidst the rise of NFTs, fans paid nearly \$2 million for a set of NFTs by Delbo and a team of Hackatao artists (Pearce, 2021). This case raises questions about who has the right to sell NFTs: the comic's author or the company that owns it. If the works sold as NFTs were created as part of official duties for a publisher, they are considered official works. However, if the author creates a comic independently, and the company wants to publish it for commercial gain, their relationship is determined by the license agreement. After the Delbo precedent, DC Comics issued a notice prohibiting the creation of NFTs with DC characters. This incident underscores the copyright conflicts between creative workers and corporations in the entertainment industry, brought to light by new technologies.

Algorithms as Intermediaries and Trust Issues

Algorithms act as intermediaries between creators and their audience, as well as between developers and corporations. The popularity of crypto art among Internet users stems from its portrayal as an experimental showcase of blockchain technology's potential in the digital realm, with NFTs serving as a means to solidify property rights in virtual spaces.

Moreover, NFTs represent an endeavor to establish virtual art as both elite and accessible, bridging the digital and physical worlds to reshape our artistic perceptions. This fusion highlights how technology not only alters artists' methods of expression but also reshapes our artistic sensibilities. Despite its online accessibility, the storage of virtual assets can hold as much value as traditional physical artworks.

Blockchain technology addresses trust issues in transactions through algorithmic solutions. The emergence of crypto art aligns closely with the principles demonstrated by blockchain technology. If we approach algorithms as neutral arbiters, however, we may overlook the biases that developers, consciously or not, may introduce, as well as the social dynamics among all parties involved.

In the context of fraudulent transactions with NFTs, complexities arise due to multiple factors at play. Fraud in the NFT markets, often referred to as scams, encompasses a range of activities, from hacking crypto wallets to selling unauthorized copies of original works. These instances, such as the unauthorized sale of copied works, directly violate copyright laws, complicating the verification of authenticity within the digital art market. For example, in March 2021, digital artist Weird Undead lodged a complaint with the OpenSea platform after dozens of her works were sold without her consent (Roberts, 2021).

A more intricate form of fraud involves the imitation of renowned artists, posing greater challenges in detecting such scammers, which can be illustrated by the case of digital artist Derek Laufman (Stephen, 2021). Despite platforms implementing profile verification processes, fraudsters can still deceive the system. This case underscores the verification challenges on NFT platforms, where anyone can falsely claim to be a famous artist.

The matter of trust is also influenced by technological factors. The case of the above-mentioned game *Cryptokitties* is quite illustrative in this respect. Through its speculative mechanics, this game provided a unique opportunity for its creators to profit. Players were encouraged to breed virtual cats, earning ethers as a reward. The repetitive nature of this process, coupled with its unconventional appeal, captured widespread attention. Despite the whimsical allure of these digital cats, the idea of spending \$1,000 on one was so outlandish that it became a sensation, driving a surge in user engagement. However, as the novelty wore off, so did the demand, resulting in a decline in both average prices and sales volumes by the beginning of December 2020. While *CryptoKitties* could not sustain its initial broad appeal, it still processes approximately 50 Ethereum per week. Subsequently, other developers improved upon the game, introducing features like Kitty Race and Kitty Hats. This evolution was facilitated by the original *CryptoKitties* game allowing developers to build upon its foundation without explicit permission, enabling the game to thrive beyond its initial scope.

Discussion and Conclusion

This study intended to provide an overview of the problem of non-fungible tokens (NFTs) as a tool for authentication. On the one hand, NFTs offer solutions to issues such as tracing a picture's origin, market transparency, liquidity, and regulation of new media and technologies. On the other hand, anyone can claim authorship and tokenize someone else's artwork, raising questions about the authenticity of such pieces.

Crypto art holds potential comparable to physical paintings and sculptures, with artists benefiting most from NFTs as they gain a means to profit from their digital

works. NFTs are meant to revolutionize ownership rules, extending beyond the art market to sectors like real estate, where tokens can address land ownership issues. Transactions recorded in blockchains are reliable due to immutable information and smart contracts ensuring agreement compliance.

However, blockchain technology faces a number of challenges, including environmental concerns such as increased carbon dioxide emissions. The energy-intensive nature of blockchain operations, particularly under the “proof of work” algorithm, contributes to this issue. Nonetheless, efforts are underway to mitigate these environmental impacts.

The rise of crypto art also raises copyright issues, with attempts to leverage NFTs for copyright management. Nevertheless, NFTs still hold promise for authenticating digital objects and art, marking a shift from the era of free content to one of metaverses and secure digital ownership.

While NFTs offer new opportunities for digital art, concerns about their speculative nature, where they are often seen as investment assets rather than authenticators of art, have prompted skepticism. However, when used appropriately, NFTs can enhance the value of digital art, especially for artists who can openly register property rights. To ensure the successful integration of NFTs into the digital artist community, it is imperative to establish effective regulatory frameworks.

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ARTICLE

Transcending Boundaries: The Role of Literature in Challenging Social Norms and Redefining Perspectives on Migration and Cultural Marginality Through the Works of Halaby, Lahiri, and Hamid

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ABSTRACT

This study aims to examine the transformative power of literature in challenging prevailing social norms and reshaping perspectives on migration, alterity, and cultural marginalization. Focusing on the novels *Once in a Promised Land* by Layla Halaby, *The Namesake* by Jhumpa Lahiri, and *Exit West* by Mohsin Hamid, the analysis examines the representation of the individual Other, challenging stereotypes, and highlighting the characters' personal and political traumas. The concept of nowherehood, which stands for the emotional and psychological state of migrants moving in unfamiliar cities, is explored, highlighting the paradoxical experience of simultaneous death and rebirth. The characters in these novels are in a deep state of emptiness, serving as "citizens in waiting and deportees in waiting." Their experiences in the liminal space of waiting are closely intertwined, creating a shared temporal landscape that enriches the exploration of the complexity of migrants. In this regard, the authors challenge the conventional tactics of silencing voices and concealing images to transform the harrowing ordeals of the Other into a powerful means of social introspection. The authors engage with Western hegemony and imperialism, seeking to

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inspire understanding and admiration for subaltern cultures that are marginalized by the Western world.

KEYWORDS

Once in a Promised Land, *The Namesake*, *Exit West*, Nowhereness, statelessness

I am an Arab,
alienated from American ...

—Shereen, *On Becoming Arab*

Introduction

In the selected literary works, namely *Once in a Promised Land*, *The Namesake*, and *Exit West* by Layla Halaby, Jhumpa Lahiri, and Mohsin Hamid, the portrayal of the individual Other departs from the stereotypical archetype of the terrorist and instead depicts them as an innocent victim caught in the clutches of a vast imperialist system and subjected to irrational prejudice based on race and origin. As David Williams notes, “in our time, the most common victims of political violence are non-combatants” (Williams, 2007). This observation underscores the prevalent theme of personal and political trauma experienced by the characters in the narratives. As a result, our study aims to unravel the evolving foundations of alterity by explaining how these stories shed light on a shift in perspective. Specifically, they illuminate the experiences of the cultural Other and present counter-narratives that challenge and diverge from prevailing approaches to storytelling. Through a nuanced examination of both the personal and political dimensions, these narratives serve as compelling lenses through which to cope with the complexities of the now, and in turn contribute to a better understanding of the intricate dynamics at play within the overarching narrative fabric.

The concept of nowhereness in the aforementioned novels can be understood as the emotional and psychological state of migrants moving in the unfamiliar cities in different parts of the world. This is depicted in the novels where the characters experience a sense of transition and sudden uprooting that comes with a traumatic migration, highlighting the paradoxical experience of dying and being born at the same time, reflecting the paradoxical language that refugees use to describe their own experiences (Haas, 2017, p. 82).

The characters in the novels discussed here are in a profound state of emptiness, transforming themselves into “citizens in waiting and deportees in waiting,” embodying a temporality of waiting that is characterized by specific configurations of power (Haas, 2017, pp. 75, 77). This notion serves as a reflection of the emotional and psychological dislocation inherent in the migration experience. In their exploration of the temporal dimensions of migration, the novels go beyond mere narrative structures and connect individual experiences in complex ways. This connection creates a profound sense of unity through simultaneity and illustrates how the characters’ collective journey in the liminal space of waiting becomes a shared, albeit emotionally charged, temporal landscape. This representation explores the nuanced intricacies of the characters’

psychological and emotional states, offering a richer and more resonant exploration of the complex context of migrant experiences.

We can argue, then, that these novels defend the cause of those who have endured and continue to endure the consequences of irrational hostility towards those perceived as different. By reversing the conventional tactics of the dominant ideological state apparatuses to suppress voices and conceal images that reinforce their ideological agenda, authors such as Halaby, Lahiri, and Hamid effectively transform the harrowing agony of the Other into a powerful tool in the struggle for consciousness. In this regard, Sinno (2017) emphasizes the pivotal role that authors play in transforming English from a language associated with colonization into a means of promoting constructive dialogs through their literary works (p. 134). This highlights the crucial role that literary creations play in not only challenging but also reshaping social norms. Authors are called upon to go beyond merely crafting narratives; they must give their works the power to act as arenas where cultures collide and meet, serving as a crucible for understanding and growth. The literary works presented here have the task of guiding the inhabitants of the global community away from the polarizing "us versus them" mentality that is prevalent in today's political discourse. Instead, these works should serve as catalysts for collective change towards unity and empathy. In essence, literature should be used alongside art as an effective tool for national healing, helping the nation reconcile with the profound tragedies of its past and fostering a shared journey towards a more compassionate and inclusive future.

Through their literary work, the authors confront and reject Western hegemony and imperialism. Their aim is to inspire genuine understanding and admiration for subaltern cultures, those communities that are continually marginalized by the Western world, a marginalization that continues today.

To better understand some of the theories used in this study, we briefly review the key concepts and the most important critics.

René Girard's theory of mimetic desire is closely interwoven with identity and migration. Girard assumes that desire is fundamentally imitative, meaning that people desire things because others desire them (Palaver, 2013). This concept also extends to the formation of group identities, where imitative desire influences identity and creates conflict, as imitation fosters rivalry. Girard emphasizes that imitating other people's desires can lead to conflict and rivalry, especially if the individuals end up desiring the same things and potentially becoming rivals in the process (Andrade, n.d.).

Furthermore, Girard's theory links mimetic desire to the broader context of migration. The tragic phenomenon of migration is viewed through the lens of mimeticism, suggesting that there is a mimetic dynamic behind migration, where desires and aspirations are mimicked within groups, affecting their movements and interactions. This perspective sheds light on how mimetic processes influence not only individual desires but also collective behaviors, such as migration patterns.

Bauman's theory underscores the significance of perceived identity in intercultural encounters, where individuals' self-perception is influenced by how they believe others view them (Amit & Dolberg, 2023). This concept is crucial in understanding the dynamics of migration, as immigrants' sense of belonging and identification with their

host society are shaped by external perceptions (Amit & Dolberg, 2023). The process of migration often involves a negotiation between maintaining one's cultural heritage and adapting to new cultural norms, reflecting the fluidity and complexity of identity formation in a globalized world.

Fredrik Barth, a prominent figure in anthropology, has contributed significantly to the understanding of ethnic identity and migration. Barth's work focuses on the persistence of ethnic groups and the boundaries that define them, challenging the notion that cultural diversity is maintained by geographical and social isolation alone (Freedman, 1970). He highlights how ethnic boundaries persist despite interactions and mobility across them, and emphasizes the social processes of exclusion and inclusion that maintain discrete categories within ethnic groups (Freedman, 1970).

Barth's research illuminates the complicated dynamics of ethnic identity formation and maintenance, showing how stable social relationships are maintained across ethnic boundaries even though participation and membership changes over time. His work emphasizes the importance of understanding cultural variation as discontinuous, with different cultural groups sharing commonalities while maintaining interconnected differences that set them apart.

Edward Said's concept of Orientalism, outlined in his seminal work *Orientalism* firstly published in 1978, is concerned with the Western construction of knowledge and perceptions about the East, particularly Asia, North Africa, and the Middle East. Said (1994) argues that Orientalism is not just an academic field, but a system of knowledge production deeply intertwined with imperialism and power dynamics, in which Western representations of the East are often distorted, romanticized, or essentialized in order to justify colonial domination (Lewis, 2004, p. 120).

Said's analysis shows how Orientalist discourse perpetuates stereotypes and reinforces Western superiority by creating a binary opposition between the East and the West and portraying the East as inferior and exotic. He criticizes how Orientalism has been used to justify colonial rule and continues to influence foreign policy today by perpetuating stereotypes and justifying interventions in Southwest Asia and North Africa.

Navigating Nowhereness in *The Namesake*

Jhumpa Lahiri's *The Namesake* explores the fascinating narratives of the diasporic journey. Spanning across Kolkata, Boston, and New York, the book deals with the intricacies of navigating between two contrasting cultures characterized by different religious, social, and ideological differences. The narrative depicts the challenges faced by first and second generation Indians who have settled in America. The novel skillfully portrays the tensions arising from the dual struggle between preserving Indian cultural roots and absorbing American influences, as well as the conflict between preserving family traditions and individual freedom. Furthermore, it is worth noting that immigrants have no image of themselves in the post-global West due to "contact with English values" and the absence of Native culture (Upstone, 2009, p. 154). The poignant realization of being an outsider despite being born in one's adopted country is artfully highlighted in the novel. Lahiri's *The Namesake* begins with Ashima

fondly remembering her homeland while in the advanced stages of pregnancy and hospitalized for delivery. In this context,

nothing feels normal to Ashima, nothing has felt normal at all. It's not so much the pain, which she knows somehow, she will survive. It's the consequence: motherhood in a foreign land. It was happening so far from home, unmonitored and unobserved by those she loved. (Lahiri, 2010, pp. 5–6)

When the Ganguli couple move to the USA and settle in Cambridge and Massachusetts, they are confronted with a new culture and have to come to terms with it. What Lahiri undertakes here “is an attempt to disrupt the narratives forged to define the dominant culture, to hybridize the discourse, and to reconfigure the concept of all cultural identities as fluid and heterogeneous” (Williams, 1999). Ashoke, an engineer at the Massachusetts Institute of Technology, adapts to American life more quickly than his wife Ahima, who resists the American elements and longs for her family in Kolkata. After the birth of their son, the Gangulis realize the urgency of naming the child and decide on Gogol, after the Russian writer Nikolai Gogol, to whom Ashoke owes his life.

However, Gogol, who is unaware of the meaning of the name, has difficulty identifying with Americans or Indians. Despite a circle of Bengali immigrant friends, the Ganguli family cannot consider “Pemberton Road their home” (Lahiri, 2010, p. 108). Gogol and Sonia, who were born and educated in America, wish to be accepted as Americans but feel alienated from both their parents and their American friends, who view them as outsiders. Lahiri’s narrative emphasizes the centrality of “home” as a transnational space. In this sense, according to Bhabha,

in the stirrings of the unhomely, another world becomes visible that does not remain the domain of domestic life, nor does the world simply become its social or historical counterpart. The unhomely is a shock of recognition of the world-in-the-home, the home-in-the-world. (Bhabha, 1992, p. 141)

In *The Namesake*, Ashima’s sense of unhomeliness, that is her ability to cope with the world of her home and ultimately be at home in the world, creates a tension between domestic space, her transnational identity and her ability to cope with different cultures.

Furthermore, displacement leads to the emergence of the concepts of double consciousness and homelessness, which are key features of postcolonial diasporic identity. Lois Tyson aptly analyzes this notion and states,

double consciousness often produced an unstable sense of self, which was heightened by the forced migration colonialism frequently caused. Being “unhomed” is not the same as being homeless. To be unhomed is to feel not at home even in your own home because you are not at home in yourself: your cultural identity crisis has made you a psychological refugee. (Tyson, 2006)

Consequently, diasporic identity is multi-layered and constantly evolving. Lahiri's narrative craft emphasizes the transformative power of literature as a means to illuminate the intricate interplay between individual anguish and collective suffering, traversing the realms of memory, history, and identity. This endeavor underscores that literature is not limited to a solitary pursuit; it is a profoundly political act, a form of cultural resistance that challenges orchestrated ideological efforts (Said, 2000, p. 183).

Lahiri's first generation characters, Ashoke and Ashima, are deeply connected to Bengali culture. Ashima, a typical Bengali woman, does not address her husband by his name and pays careful attention to Bengali ceremonies for her children Gogol and Sonia to inculcate Indian values. To familiarize their children with Bengali culture, the family often attends Bengali social events. This exemplifies how Ashima maintains her Indian cultural roots while living in a modernized American society. In this regard, Angenot believes that culture

legitimizes and publicizes certain views, tastes, opinions, and themes. It represses others into the chimerical, the extravagant ... in the social discourse you find in coexistence all the soft forms of social domination of classes, sexes, privileges, and statutory powers. (Angenot, 2004)

The novel depicts a cultural conflict, as Gogol's parents try to raise their children in Indian traditions, while the children are more inclined towards American culture. Although the visit to Kolkata brings joy to the parents, Gogol and Sonia feel no connection to India or their relatives. In contrast to their parents' preferences, the siblings show a greater affinity for Christmas than for Durga Puja and find Bengali cultural lessons uninteresting. While their parents refer to India as "desh" (country), Gogol perceives it differently, seeing it as Americans do, simply as India (Lahiri, 2010, p. 118). As is typical of American children, Gogol eventually moves away from home, not out of disdain for his parents, but because their conversations do not pique his interest.

Throughout the narrative, Gogol feels a deep discomfort with his first name, prompting him to embark on a journey of cultural mobility and rename himself Nikhil. This act signifies a conscious move away from his Bengali heritage as he seeks an identity that better aligns with his goals. In his article analyzing ethnic discrimination in Myanmar, David Thang Moe states:

Living in such a discriminatory situation, what should ethnic minorities do? I must suggest that there are at least two directions in which ethnic group individuals should proceed—defending their ethnic identity and decolonizing Burmanization. One is defensive, and the other is prophetic. (Moe, 2019, p. 80)

Gogol consistently distances himself from his cultural roots, which is evident in his romantic entanglements with white girls like Maxine and his admiration for her family, while at the same time he is ashamed of his own parents for not conforming to American cultural norms. Gogol's rebellious nature, reflected in his name change, also manifests itself in acts of defiance, including a brief affair with a white girl named Ruth.

Although he later enters into a more permanent relationship with Maxine, a privileged white girl, Gogol undergoes a transformative realization when he becomes “conscious of the fact that his immersion in Maxine’s family is betrayed of his own” (Lahiri, 2010, p. 141). This narrative underscores Gogol’s ongoing cultural mobility, characterized by his attempts to cope with and reconcile conflicting aspects of his identity within the complex framework of cultural and personal intersections.

As Gogol gradually realizes the importance of his family and cultural roots, he embarks on a cultural journey by marrying Moushumi, a Bengali girl who adheres to Indian traditions and rituals. Moushumi, who is initially constrained by her parents’ strict Bengali upbringing, however, embraces freedom in her twenties and leads a liberated lifestyle characterized by encounters with men in various situations. This eventually leads to a divorce between Moushumi and Gogol, where they admit to each other that they do not see marriage as a commitment, contrary to the expectations of Ashoke and Ashima’s generation. Meanwhile, Sonia prepares to marry an American man named Ben. The widowed Ashima, opting for a rootless existence, sells her American home and divides her time between the United States, where her children live, and Kolkata, where other family members reside. This nomadic lifestyle reflects her claim to both countries, but the question of which home she is truly responsible for remains unanswered. At the end of the novel, Gogol takes his name and confronts his family history. He reads a collection of Nikolai Gogol’s stories, a birthday present from his father, and begins to see his family’s history as a series of accidents, from his father’s train crash to his unhappy marriage. In this vein, Joel Pfister (2000) notes that “the affirmative capacity of culture is to generate incentives, energies, and ideas that promote progressive social change” (p. 610). Active participation unlocks the inherent positive potential in cultural customs, beliefs and expressions. This active engagement not only unleashes the transformative power of these cultural elements, but also encourages the creation of incentives, energy and innovative ideas. Such dynamic participation creates a driving force that drives positive and progressive social change.

The novel ends with Gogol experiencing a new sense of liberation, which paves the way for him to realize his individual goals. However, he is unable to fully adapt to American culture or seamlessly connect to his Native American roots. Consequently, *The Namesake* is a poignant portrayal of a post-colonial diasporic narrative that offers an insight into the ongoing dilemmas faced by South Asian diasporas in the First World. The clash of different cultural forces within diasporic communities results in individuals being trapped like psychological refugees in the liminal space between two homelands to which they are not fully attached. This narrative is a poignant testament to the constant struggle and cultural fluidity that diasporic individuals experience as they struggle to find their identity in a complex and diverse global landscape. *The Namesake* therefore not only tells a personal story, but also becomes a mirror reflecting the broader societal challenges and nuances associated with the diasporic experience.

In Lahiri’s *The Namesake*, the concept of unhomeliness manifests itself as the diaspora copes with the challenges of living in one place and emotionally belonging in another, illustrating the sense of exile, breakdown of communication, lack of belonging, societal complexities, and complicated social status of Indian immigrants

and American-born Confused Desis (ABCDs) in the United States. The novel explores themes of the immigrant experience, identity, displacement, intergenerational relationships and conflict, and raises the crucial question: Which homeland does the diaspora really belong to, culturally and geographically? The narrative underscores the characters' sense of non-belonging as the Ganguli children struggle with the realization that they belong neither to America nor to India.

Gogol, unable to erase his past, acknowledges his name and his parents' home, recognizing the importance of both his Indian heritage and his current residence in America. However, his responsibility for the past and the present becomes a source of confusion and leaves him in a state of uncertainty. Similarly, after Ashoke's death, Ashima dreams of the American dream for her children, though she clings to Indian morals and culture at home. She sells her house in the US but chooses to divide her time equally between India and the US. This decision reflects her status as an Indian diaspora who feels no responsibility for either her Indian or American home and lives without a home of her own—an inhabitant of nowhere. In this context, Bhat (2021) views diaspora as a contested cultural and political terrain where individual and collective memories collide, recombine and reconfigure. Furthermore, Bhat also emphasizes the sense of unbelonging that migrants and diasporic communities experience, highlighting the nebulous state of not being able to locate oneself, as well as the heightened sense of disjunction and discontinuity (Bhat, 2021).

The inhabitants of the now, the diasporas, are essentially in a constant state of transit, neither fully integrated nor fully detached. They inhabit a tragic space of Now and consciousness. The more conscious they become, the deeper the feelings of tension, stress and tragedy become, mirroring Lahiri's representative characters, Gogol and Ashima in *The Namesake*. The tension between assimilation in the free American world and the need for ethnic identity pushes the diasporas further into the space of nowhere, which means constant encounter, confrontation and tension in their search for a sense of belonging.

Silk Threads of Belonging in *Once in a Promised Land*

In her novel *Once in a Promised Land*, Halaby skillfully weaves a narrative that explores the complicated lives of characters like Jassim and Salwa. The totality of their experiences reveals the pervasive influence of neoliberal policies and market forces that compel the characters to make choices shaped by market preferences and economic incentives. The choices they make in response to these forces affect the various dimensions of their existence. Jassim and Salwa's diasporic situation becomes a lens through which we observe the complex interplay between individual agency and the broader socio-economic landscape. As they cope with the multiple challenges of their new lives in America, a land of opportunity, the stark contrast with their country of origin, Jordan, becomes emblematic of the broader diasporic experience, in which individuals must negotiate the ever-changing dynamics of cultural identity, economic pressures, and the promises and pitfalls of their adopted country. In this regard, "non-belonging plays out on many levels, and it seems that

the question of where one belongs and where 'home' lies is a never-ending process" (Valassopoulos, 2014).

Consequently, Halaby structures her narrative around the theme of "the dichotomy between tradition and modernity," depicting a dynamic clash between a Jordan rooted in tradition and an America that embodies modernity (Grewal, 2005, p. 75). To convey the story of these diasporic individuals, the author draws on mythology and folklore to create innovative spaces of discourse in which to discuss the effects of unjust racial profiling and cultural stereotyping, while simultaneously challenging the dominant binary narrative of "us versus them." As the line "What Jassim didn't know, and what Salwa hadn't fully realized, yet was that in breathing her first breath on American soil, she had been cursed" (Halaby, 2007, p. 49), the novel's use of language and structure, with its "before and after" sections, references the rhetoric of American fairy tales and Arabic folklore, reflecting the dynamic interplay of cultures and identities.

Halaby has chosen to structure her story with a "before" and an "after" section. The introductory paragraphs of these sections are reminiscent of the traditional beginnings of Arabic fairy tales, which begin with the sentence "Kan ya ma kan fi Kadeem az-zaman" [They say there was or there was not in older times] (Halaby, 2007, p. vii). In this first section, the story unfolds of a man who is passionate about the science of water and a woman with a penchant for Arabic numerals who wears silk pajamas. These characters live in the American provincial town of Tucson, Arizona, and illustrate the interplay of cultures and identities in this environment (Halaby, 2007, p. vii).

The story of Salwa and Jassim serves as a cautionary tale that highlights the dangers of stigmatizing people from a different cultural background. In line with Fadda-Conrey's perspective, Salwa and Jassim's Arab-American identities, characterized by racial and gender dimensions, are inevitably labeled as permanent outsiders in a diasporic country—standing on the edge of cultural intersections and societal mergers (Fadda-Conrey, 2011, pp. 542–543). As Arabs and Muslims, they struggle with what Edward Said described as "the web of racism, cultural stereotypes, political imperialism [and] dehumanizing ideology" (Said, 1994, p. 27). Their identities as "others" remain subject to constant scrutiny and reinterpretation in contrast to the dominant "us" (Said, 1994, p. 332). While the young wife is aware of Arab stereotypes early on in the story, as her reference to Jassim's particular characteristics and accent that could lead to deportation shows, the husband somewhat naively resists racial and religious intolerance until the end of the story (Halaby, 2007, p. 58). Individuals living in the diaspora can essentially be described as inhabitants of nowhere, embodying a perpetual state of transit in which complete integration and total disengagement are not possible. Their existence is characterized by a duality that occupies a tragic space in which the now merges with a heightened consciousness. This state of liminality embodies a deep sense of neither here nor there, a perpetual journey where the boundaries of cultural integration blur and diasporic identity becomes a dynamic and evolving phenomenon. As they cope with this complicated space, the fluid nature of cultural identity becomes strikingly clear, especially in the case of individuals like Jassim. In an interview with Zócalo, Randa Jarrar explains of her novel *A Map of Home*, "I had to create my own Arab-American character. There weren't any I could relate to,

not only in fiction, but obviously in popular culture” (Randa Jarrar on *A Map of Home*, 2009). It seems clear, then, that Halaby is following a similar train of thought.

After an unintentional fatal car accident, Jassim becomes the focus of an FBI investigation, a dramatic turn of events that puts him in the glare of suspicion. Although he adheres to social norms and conforms politically, his identity as a man, Arab and Muslim in post-September 11, 2001 America casts a long shadow of doubt over him. This unfortunate situation is a reminder that cultural identity is fluid in a society full of prejudice and preconceptions. As Valassopoulos points out, “Jassim’s thoughts are that it is no longer enough to speak the language, pay your taxes, and play the game, but that now is also the time to reevaluate what it might mean to be an Arab in the US, and in turn, to be Arab and perhaps even American” (Valassopoulos, 2014). Jassim’s experience is an example of the difficult reality faced by people in the diaspora, where their identity is shaped not only by their personal choices but also by the external lens through which society views them, perpetuating a cycle of constant otherness and struggle for authentic self-expression.

I am a scientist ... I am a normal citizen who happens to be an Arab. Yes, I have access to the city’s water supply, but I have no desire to abuse it. The mere fact that I’m an Arab should not add suspicion to the matter ... I have spent my entire life trying to find ways to make water safe and accessible for everyone. Just because I am an Arab, because I was raised a Muslim, you want to believe that I am capable of doing evil. (Halaby, 2007, p. 232)

Jassim’s words make it clear that he is cautious when it comes to fully embracing the anti-Arab and Islamophobic atmosphere that prevailed after the September 11, 2001 attacks. This caution reflects his reluctance to bow to the prejudices and biases that have become increasingly prevalent in American society since that pivotal moment in history. Jassim is understandably apprehensive about openly engaging in a climate that seems to unfairly target Arab and Muslim communities, causing him to question the evolution of his own identity and the place he and his culture occupy in this altered post-9/11 landscape.

People, companies, the city, shouldn’t be able to pull accounts on the basis of his being an Arab. Yes, finally he saw what had been sitting at the back of his consciousness for some time in a not-so-whispered voice: with or against. But was he not with? I understand American society, he wanted to scream. I speak your language. I pay taxes to your government. I play your game. I have a right to be here. How could this be happening? (Halaby, 2007, p. 234)

Salwa initially seems to embody the archetype of a migrant woman who moves “from confinement within a patriarchal culture to freedom within American liberal civic society” (Grewal, 2005, p. 63). However, this shift between cultures ultimately ends in complete confusion. Furthermore, Salwa, who is “of Palestinian origin but resides in Jordan”, struggles with the inability to reconcile her cultural differences. This struggle

underscores the fact that place of birth settles under the skin and remains connected by imperceptible threads: “Salwa and Jassim are both Arabs. Both Muslims. But of course they have nothing to do with what happened to the World Trade Center. Nothing and everything” (Halaby, 2007, p. viii). Therefore, when a person leaves their place of birth to move to a new place, there is always an unsettling pull as these silk-like threads are taut. This illustrates the impact of cultural mobility on an individual’s sense of self and belonging, as well as enduring ties to cultural heritage.

The novel concludes on a pessimistic note, as the transnational connections that initially symbolized a shift from tradition to modernity ultimately lead to a tragic return to familiar conventions. In the final section, Halaby uses the concept of the “ghula”, a female figure who has a monstrous or magical reputation in the Arab world. This figure is known for enticing immigrants and their descendants to realize the American dream while abandoning their values, culture, language and religion. Halaby uses this character to tell a story about how Salwa’s rebellion against the gender boundaries imposed by the patriarchal system had detrimental consequences on her life (Fadda-Conrey, 2011, p. 543). Salwa faces violent consequences for disobeying the norms imposed on women in her original community.

In America, the protagonist becomes a symbol of the persistence of patterns of oppression in her homeland, as she belongs to a “diasporic subclass” that is both “super-dominated” and “super-exploited” by colonialism (Spivak, 1996, p. 249). Salwa’s culturally hybrid journey takes her to the hospital where she recovers from the wounds inflicted by her American lover. As the narrator conveys in the final lines of the book, the notion of “happily ever after” is a concept exclusive to American fairy tales (Halaby, 2007, p. 335). For Salwa, America is transformed into a shattered dream that represents disillusionment, for the America that lured her was not the America of her birth, but the exported America of Disneyland, hamburgers, Hollywood and the Marlboro Man (Halaby, 2007, p. 49).

Both Salwa and Jassim are unable to make the final leap into American life that promises a happy ending, “yet Halaby points out that post-9/11 Arab Americans have fallen a step behind other social outsiders and are branded not only as second-class citizens but also as a social threat” (Banita, 2010, p. 246). As the last lines of the story show, it is a paradox: “Wasn’t this an American fairy tale? It was and it wasn’t” (Halaby, 2007, p. 335). The narrative of Jassim and Salwa contradicts the contours of a fairy tale; the America in which they move does not reflect the idyllic images of a promised land. The struggle intensifies as the diaspora grapples with the tension between assimilating into the free spheres of American society and the inherent need to preserve their ethnic identity. This dichotomy pushes them further and further into the realm of nothingness, creating a constant interplay of encounters, confrontations and tensions in their relentless search for a deep sense of belonging.

Statelessness and Fragility of Identity in *Exit West*

Mohsin Hamid’s fourth novel, *Exit West*, is a significant early literary response to the growing number of displaced people in the 21st century and the resulting political and

humanitarian crises. It is an important early literary response to the growing number of displaced people in the 21st century and the resulting political and humanitarian crises. Although literary fiction cannot match the immediacy of journalism in addressing geopolitical events, the novel, published in February 2017, was released shortly after a significant rise in global displacement since the Second World War, reflecting the novel's themes. Hamid, who is already an internationally recognized author, played a central role in ensuring that the novel was widely noticed by critics and the public, especially as there were few literary works that dealt with the "European migrant crisis" in such a timely manner.

The author Hamid wanted to distance himself from his characters and instead encourage readers to identify with them. This is a recurring theme in his work, which emphasizes the reader's role in creating meaning. The namelessness of Saeed and Nadia's city serves a dual purpose: it invites readers to fill in the blanks with their own city names, while suggesting that many cities in the Global South, including Hamid's own birthplace, may eventually resemble it. In his novel *The Reluctant Fundamentalist*, Hamid reveals, "I dreamed not of Erica, but of home" (Hamid, 2007, p. 105). The *Exit West* begins in a city that is not officially at war, as we read in the first lines: "In a city swollen by refugees but still mostly at peace, or at least not yet openly at war, a young man met a young woman in a classroom and did not speak to her. For many days" (Hamid, 2017, p. 1). Furthermore, the novel deals with the idea that every human being, regardless of their physical movements, is a migrant through time. This concept of temporal migration suggests that our experiences and sense of belonging are constantly evolving and changing, even if we remain in the same physical space. In this respect, the novel presents a complex and multi-faceted exploration of the concept of home and how it is affected by movement, displacement and the redefinition of community and belonging.

The opening sentence of the novel paints a negative picture of refugees. The term "refugees" is used without descriptive words or individualization, marginalizing them in the prose. In fact, "refugees" are mentioned early on in the novel, but in a subordinate clause in which they are not the subject. As Nadia and Saeed's relationship deepens, they become increasingly aware of the growing influx of refugees into their city. In the second chapter, we are introduced to the first of several depictions of refugee camps in the novel.

Refugees had occupied many of the open places in the city, pitching tents in the green belts between roads, erecting lean-tos next to the boundary walls of houses, sleeping rough on pavements and in the margins of streets. Some seemed to be trying to recreate the rhythms of a normal life, as though it were completely natural to be residing, a family of four, under a sheet of plastic propped up with branches and a few chipped bricks. Others stared out at the city with what looked like anger, or surprise, or supplication, or envy. Others didn't move at all: stunned, maybe, or resting. Possibly dying. Saeed and Nadia had to be careful when making turns not to run over an outstretched arm or leg. (Hamid, 2007, p. 23)

The text emphasizes the marginal status of the refugees by highlighting their presence between roads and near borders as well as their makeshift sleeping places on the side of roads. The phrase “as if it were natural” emphasizes the unnaturalness of their situation. These refugees not only occupy marginal spaces, but also live in extremely precarious conditions. Although Saeed and Nadia do not seem to be bothered by the refugees’ presence per se, they are also unable to relate to them, and their reticence is presented as an obligation. This paradox is central to Hamid’s novel: while addressing the lack of empathy for refugees in today’s world, *Exit West* attempts to evoke the reader’s empathy for two characters who themselves initially struggle to empathize with the refugees. This paradox forms the basis for the novel’s exploration of changing perspectives on the refugee experience.

While the exact identity of Saeed and Nadia’s home country is not disclosed, their citizenship is of paramount importance. Edward Said referred to refugees as “a creation of the twentieth-century state” (Said, 2013, p. 163). Furthermore, Giorgio Agamben argues that “in the nation-state system, the so-called sacred and inalienable rights of man prove to be completely unprotected at the very moment it is no longer possible to characterize them as rights of the citizens of a state” (Agamben, 1995, p. 116), claiming that the concept of the refugee “radically calls into question the principles of the nation-state” (Agamben, 1995, p. 117). In *Exit West*, Hamid argues that the mass migration of refugees is not only a crisis for certain nations in individual cases, but for the nature of nationhood itself. In Saeed and Nadia’s city, the refugees’ lack of rights, security and individuality is inextricably linked to their statelessness:

Home as a fixed entity is deconstructed and the migrant imagines new forms of belonging both to the country of origin and to the country of residence. The duality and ambivalence of national and diasporic imagination are explained through the interstitial spaces of cultural memory and remembrance of past life both in the homeland and in the hostland. (Shirazi, 2018)

Finally, Saeed and Nadia themselves lose their so-called “inalienable rights” when they leave their homeland and become “aliens.” This transformation underlines the fragility and uncertainty associated with their new status and reflects the broader themes of citizenship and identity explored in the novel.

The depiction of the refugee camp on a Mediterranean island where Saeed and Nadia find themselves in Hamid’s novel is vivid, with hundreds of tents, makeshift fires in oil drums and a multitude of non-white faces. One striking aspect of *Exit West*, however, is its deliberate avoidance of depicting the extremely dangerous and tragically deadly journeys undertaken by millions of displaced people in the second decade of the 21st century. The absence of such dangerous scenes is due to a unique element in the narrative: magical “doors” scattered around the world. It is not until the fourth chapter of the novel, when the conflict in their city comes to a head, that Nadia and Saeed first encounter the concept of these doors.

Rumours had begun to circulate of doors that could take you elsewhere, often to places far away, well removed from this death trap of a country. Some people claimed to know people who knew people who had been through such doors. A normal door, they said, could become a special door, and it could happen without warning, to any door at all. (Hamid, 2007, pp. 69–70)

In *Exit West* by Mohsin Hamid, the magical doors serve as a central and metaphorical element that has a deep meaning throughout the narrative. These doors act as conduits that allow for instantaneous movement between different locations, overcoming physical barriers and boundaries. By allowing characters to move seamlessly between locations, the doors symbolize the fluidity and interconnectedness of global migration patterns. These doors serve as a literary device to explore the psychological and cultural effects of migration on the individual and to illustrate the complexity of home, belonging and identity in a diasporic context. The magical doors not only enable physical movement, but also contribute to the characters' sense of being in nowhere-ness. In this process, they can be seen as “dematerialized” from their citizenship and “recomposed” as stateless individuals, giving up their supposedly “sacred and inalienable rights” (Agamben, 1995, p. 115).

It is worth noting that *Exit West* invites us to think about a world in which people have access to unregulated networks that enable fast travel over long distances. The novel encourages us to think about how these networks are already being used to transfer capital, images, information and misinformation, and how they can either promote liberation or exacerbate inequalities. Crucially, the novel aims to inspire empathy in its readers for the protagonists from the refugee movement. At the same time, it reminds readers who have no direct contact with displaced people that their perceptions of refugees are filtered through these existing networks. In fact, these networks may not be conducive to recognizing the humanity of others. An example of this is Nadia's experience of viewing an online photo that she believes to be of herself. At this point in the novel, we probably identify strongly with her, but as she looks at this picture, she feels alienated from herself.

Furthermore, *Exit West* argues that people are not only temporal migrants, but also relational migrants. Nadia and Saeed are portrayed as people who move together but also move apart (Chambers, 2019, p. 238). Chambers (2019) raises legitimate questions about Hamid's stance towards the notion that everyone is a migrant, as this can oversimplify the complexity of the refugee experience, especially when voiced by an affluent cosmopolitan author. Nonetheless, Hamid's inclination towards the idea of universal migrancy is evident. He claims that “all of us, whether we travel far afield or not, are all migrants through time” (Hamid, 2014, p. xvii). Hamid even goes so far as to claim that we are all refugees, as in the final chapter of *How to Get Filthy Rich in Rising Asia*, where it states, “we are all refugees from our childhoods” (Hamid, 2013, p. 219). While some might argue that this assertion comes from the novel's narrator rather than the author himself, Hamid has expressed a very similar sentiment in interviews, emphasizing that “if we can acknowledge the universality of the migration experience and the universality of the refugee experience—that those of us who have never moved

are also migrants and refugees—then the space for empathy opens up” (Chandler, 2017). In essence, Hamid’s narrative suggests that individuals who are in a constant state of transit, like the inhabitants of nowhere and diaspora, neither fully integrate nor fully disengage. They inhabit a tragic space of nowhere-ness and consciousness.

Conclusion

The emphasis on the humanity of all refugees is an important perspective that we must maintain. It underscores our shared responsibility to protect and assist those who have been forcibly uprooted due to circumstances beyond their control, such as war, persecution or natural disasters. However, it is crucial to distinguish between refugees and the population in general. Not everyone can be classified as a refugee. Although we all feel a sense of “loss” in relation to the past, this feeling is fundamentally different from the traumatic experience of being displaced by the horrors of conflict, persecution or environmental disaster.

Significantly, the novels offer a more nuanced and thought-provoking perspective by suggesting that we are all, in a sense, “migrants through time.” This concept highlights the fragility of our circumstances and reminds us that any of us, regardless of our background or current situation, could find ourselves in the position of a refugee. It causes us to empathize with the displaced and appreciate the shared vulnerability that runs through the human experience.

By challenging the conventional methods of suppressing voices and concealing images typically employed by ideological state apparatuses to convey ideological messages, writers like Halaby, Lahiri, and Hamid have the potential to transform the harrowing experiences of immigrants into a powerful tool for the pursuit of citizenship. In this context, literature proves to be a means of debunking any romanticization of radicalism and serves as a vehicle for disseminating an unequivocal critique of brutality and ruthlessness and promoting mutual understanding between nations. Through their literary contributions, writers play a crucial role in rejecting Western dominance and imperialism and advocating respect for the cultures of the subaltern—those who are constantly marginalized by the Western world, both past and present.

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BOOK REVIEW

Analyzing an Emerging Genre: H-Pop and Contemporary India. Review of Kunal Purohit (2023). *H-Pop: The Secretive World of Hindu Pop Stars*. Harper Collins

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Contemporary India is in a state of flux, as it undergoes paradigm shifts in its identity as a nation, the foundations of the nation being re-examined and re-defined, as a new identity emerges distinctly. In this new state, Hinduism as a religion is evolving into a political force, named Hindutva, or Hindu nationalism. Political Hinduism is widely considered and defined as Hindutva ideology, emphasizing on the Hindu pride for a nation identified as the Hindu nation. As the new nationalistic sentiments gain fervor among the public, it is imperative to analyze the cultural forces that endorse and circulate those ideologies across the state. Kunal Purohit's work titled *H-Pop: The Secretive World of Hindu Pop Stars*, probes into these creative spaces, especially that of popular music and traces the evolution of a particular form of music, which he calls a sub-genre, Hindutva Pop.

The book comes with recommendations from renowned India scholars like Christophe Jeffrelot, Aakar Patel, Rajdeep Sardesai, and Ramachandra Guha. The work is divided into three sections, thus focusing on three different artists who have been actively contributing to the growth of Hindutva politics. *H-Pop* discussing the impact and popularity of this emerging genre of music in India is a refreshingly new work and offers an insightful commentary on the new India. The work is a timely intervention that explores the world of popular music in India. The work is structured around interviews over three years of interaction, and they are attached to the text, as endnotes available by scanning the QR code.

The research began from the realization that boisterous music seems to play a considerable role in altering the character of political processions, turning them into violent ones, often directed at minority populations, especially Muslims in India. Purohit identifies and calls this new genre of music H-Pop or Hindu Pop. He

traveled with these H-Pop artists, Hindu artists who managed to grow widely popular. The work traces the immense popularity of the genre through three case studies where the author studies minutely the semiotics of the lyrics, the rhythmic patterns, and its larger implications in the nationalist Hindutva discourses. He picked three artists: first, a young female singer, Kavi Singh, who uses contemporary events to create content intended to fire up the spirit of the right-wing supporters; second, a young poet, Kamal Varma, who writes poems that reimagine history to suit the Hindutva discourses; and the third, is an older content creator, Sandeep Deo, who sees himself as a trailblazer developing new platforms for the Hindu warriors to express themselves, to train young minds in the Hindu thought and to offer alternative epistemological frameworks, founded on the Hindu ideologies.

Part I titled “Killer Beats, Poison-Laced Words” studies the work of Kavi Singh, a young woman who has recorded more than 80 songs, and her verses are highly polarizing. Purohit contextualizes her music using the genre of Hate music that originated in the West. He traces India’s tryst with Hindutva ideologies using her songs, her lyrics, and her popularity. He identifies the major tropes that establish the political Hindu positioning, through a process of othering of Muslims, and the absolute distrust of the Muslim, harbored by a large section of the Hindu population in contemporary India. Kavi Singh has four and a half million followers and is famous on various digital platforms, where she places herself as a “public persona, as a Hindutva crusader” (p. 73). Her prolific music production is targeted at the people who challenge the hegemony of the political Hindu and hence her work becomes significant, as Purohit explains in his work.

Part II of the work is titled “Weaponizing Poetry: Kamal Agney,” and describes the journey of a Hindutva poet Kamal Varma. Poets like him are integral components of the “Hindutva ecosystem” (p. 80), which blends pop culture and music with political agenda setting. Kamal is a young poet who seeks to revisit history, contextualizing the historical significance of epic texts like *Ram Charit Manas*. Poets like him have their poems structured to address the causes foregrounded by the Hindu right, and they perform at poetry recitals. They also ensure that they are present on digital platforms, disseminating toxic content. Purohit gives examples of video streaming platforms like *Namokaar*, which fails to capture the paradigm shifts in social discourses. Hindutva poetry, with its deep impact on socio-political environs, ignores the major political turmoils like Farmers’ Protest and turns away from issues like Muslim hatred, Kashmir, Ram temple, and so on.

The number of such singers and poets is on the rise, characterized by the use of aggressive words, “fiery rabble-rousing Hindutva kavi/s (poet/s)” (p. 145), loud and arrogant tonality, and where the artist and the ideology blend into one. Purohit explicates this journey using these artists and delves closely into the selective authenticity that defines H-Pop artists, as they seek to divert the attention of their audience from the real issues that plague the nation.

Part III is about 46-year-old Sandeep Deo, founder of a publishing house called Kapot, who calls himself a frontline warrior, and the section is titled “Fighting a Cultural War: Sandeep Deo”. In this segment, Purohit brings into focus the influence

of diaspora Indians as well, their active involvement being mostly in the form of financial support. Deo publishes his content on YouTube¹ channels like *India Speaks Daily*² and similar e-commerce sites. His work becomes a case study for the manner in which H-Pop artists see “publishing as a crucial ally ... to popularize Hindutva ideology” (p. 229) through “sensationalistic and bombastic rhetoric,” “graphic imagery,” and “use of bright colors” (p. 240). All three have certain commonalities, where these artists foreground the rightwing discursive patterns mostly seen in the hate for Islam, food choices, and the contested land in Ayodhya where Ram Mandir was constructed over the demolished mosque, Babri Masjid.

H-Pop focuses on music in the Hindi language that is spoken in the Northern part of India, while there are a multiplicity of languages spoken in the rest of India. Therefore, the popularity of this music, the artists, and the target audience are exclusively from central Hindi-speaking India, thus confining the scope of the work. The text is also journalistic in nature, but Purohit manages to capture the socio-political and economic dimensions of a significant and ubiquitous component of popular culture that has become an example of “Propaganda-as-pop culture” (p. xix) in contemporary India. But, above all, it manages to become a voice of the skewed concept of decoloniality advocated by the Hindu right, as the right misuses the idea of decolonial in their nationalist discourses. Purohit rightly perceives the “moral and political project” (p. 226) of the Hindutva leaders, attempting to shape the sensibilities of future generations through stories and propagate a sense of morality rooted in Hindutva ideologies, regressive in multiple ways. He succeeds in cautioning the reader against the paranoia, the Hindutva agenda of creating “homegrown, nationalistic alternatives to global digital platforms” (p. 244) and “starting knowledge clinics” (p. 252) with the possibility of spreading the message of toxic hatred to the small towns and distant lands within the nation.

¹ YouTube™ is a trademark of Google Inc., registered in the U.S. and other countries.

² <https://www.youtube.com/@IndiaspeaksdailyISD>



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Multivolume works	
Multiple volumes from a multivolume work	Levison, D., & Ember, M. (Eds.). (1996). <i>Encyclopedia of cultural anthropology</i> (Vols. 1–4). New York, NY: Henry Holt (place of publication is optional). Use Vol. for a single volume and Vols. for multiple volumes. In text, use (Levison & Ember, 1996).
A single volume from a multivolume work	Nash, M. (1993). Malay. In P. Hockings (Ed.), <i>Encyclopedia of world cultures</i> (Vol. 5, pp. 174–176). New York, NY: G.K. Hall (place of publication is optional). In text, use (Nash, 1993).
Journal	
One author	Author, A. A. (2011). Title of the article. <i>Title of the Journal</i> , 22(2), 123–231. https://doi.org/10.1080/xxxxxxxxxxxxx Volume numbers in references should be italicized, but do not italicize the issue number, the parentheses, or the comma after the issue number. If there is no DOI and the reference was retrieved from an online database, give the database name and accession number or the database URL (no retrieval date is needed): Author, A. A. (2011). Title of the article. <i>Title of Journal</i> , 22(2), 123–231. (The website name) https://www.w3.org
Two authors	Benjamin, L. T., Jr., & VandenBos, G. R. (2006). The window on psychology's literature: A history of psychological abstracts. <i>American Psychologist</i> , 61(9), 941–954. https://doi.org/10.1037/0003-066X.61.9.941
Three authors	Author, A. A., Author, B. B., & Author, C. C. (1987). Title of the article. <i>Title of the Journal</i> , 22, 123–231. https://doi.org/xx.xxxxxxxx
More authors	Include all names up to twenty. If there are more than twenty authors, list the first nineteen authors, followed by an ellipsis and the last author's name.
Organization as author	American Psychological Association. (2003). Title of the article: Subtitle of the article. <i>Title of the Journal</i> , 22(1), 12–23. https://doi.org/xx.xxxxxxxx
No author	Editorial: Title of editorial. [Editorial]. (2012). <i>Title of the Journal</i> , 14, 1–2.
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Other article types	Editorial: Title of editorial. [Editorial]. (2012). <i>Title of the Journal</i> , 14, 1–2. Author, A. A. (2010). Title of review. [Review of the book Title of the book, by B. Book Author]. <i>Title of the Journal</i> , 22(1), 123–231. https://doi.org/xx.xxxxxxxxxx
Article in journal supplement	Author, A. A. (2004). Title of the article. <i>Title of the Journal</i> , 42(Suppl. 2), p–pp. https://doi.org/xx.xxxxxxxxxx
Conference	
Proceedings	To cite published proceedings from a book, use book format or chapter format. To cite regularly published proceedings, use journal format.
Paper	Presenter, A. A. (2012, February). Title of the paper. <i>Paper presented at the meeting of Organization Name</i> , Location.
Poster	Presenter, A. A. (2012, February). Title of the poster. <i>Poster session presented at the meeting of Organization Name</i> , Location
Thesis	Author, A. A. (2012). <i>Title of thesis</i> (Unpublished doctoral dissertation or master's thesis). Name of the Institution, Location.
Unpublished work	
Manuscript	Author, A. A., Author, B. B., & Author, C. C. (2008). <i>Title of the manuscript</i> . Unpublished manuscript. Author, A. A., Author, B. B., & Author, C. C. (2012). <i>Title of the manuscript</i> . Manuscript submitted for publication.
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Newspaper or magazine	Author, A. (2012, January 12). Title of the article. <i>The Sunday Times</i> , p. 1. Author, A. (2012, January 12). Title of the article. <i>The Sunday Times</i> . http://www.sundaytimes.com/xxxx.html Title of the article. (2012, January 12). <i>The Sunday Times</i> . http://www.sundaytimes.com/xxxx.html
Reports	
May or may not be peer-reviewed; may or may not be published. Format as a book reference	Author, A. A. (2012). <i>Title of work</i> (Report No. 123). Location: Publisher. Author, A. A. (2012). <i>Title of work</i> (Report No. 123). (The website name) https://www.w3.org

Working paper	Author, A. A. (2012). <i>Title of work</i> (Working Paper No. 123). Location: Publisher. Author, A. A. (2012). <i>Title of work</i> (Working Paper No. 123). (The website name) https://www.w3.org
Discussion paper	Author, A. A. (2012). <i>Title of work</i> (Discussion Paper No. 123). Location: Publisher. Author, A. A. (2012). <i>Title of work</i> (Discussion Paper No. 123). (The website name) https://www.w3.org
Personal communication	Personal communication includes letters, emails, memos, messages from discussion groups and electronic bulletin boards, personal interviews. Cite these only in the text. Include references for archived material only.
Other reference types	
Patent	Cho, S. T. (2005). U.S. Patent No. 6,980,855. Washington, DC: U.S. Patent and Trademark Office.
Map	London Mapping Co. (Cartographer). (1960). Street map. [Map]. (<i>The website name</i>) https://www.londonmapping.co.uk/maps/xxxxx
Act	<i>Mental Health Systems Act</i> , 41 U.S.C. § 9403 (1988).
Audio and visual media	Taupin, B. (1975). Someone saved my life tonight [Recorded by Elton John]. On Captain fantastic and the brown dirt cowboy [CD]. London: Big Pig Music Limited (place of publication is optional). Author, A. (Producer). (2009, December 2). <i>Title of podcast</i> [Audio podcast]. (The website name) https://www.w3.org Producer, P. P. (Producer), & Director, D. D. (Director). (Date of publication). <i>Title of motion picture</i> [Motion picture]. Country of origin: Studio or distributor. Smith, A. (Writer), & Miller, R. (Director). (1989). Title of episode [Television series episode]. In A. Green (Executive Producer), Series. New York, NY: WNET. Miller, R. (Producer). (1989). The mind [Television series]. New York, NY: WNET.
Database	Author, A. A., Author, B. B., & Author, A. A. (2002). A study of enjoyment of peas. <i>Title of the Journal</i> , 8(3). Retrieved February 20, 2003, from the PsycARTICLES database.
Dataset	Author. (2011). <i>National Statistics Office monthly means and other derived variables</i> [Data set]. Retrieved March 6, 2011, (<i>The website name</i>) https://www.w3.org If the dataset is updated regularly, use the year of retrieval in the reference, and using the retrieval date is also recommended.
Computer program	Rightsholder, A. A. (2010). <i>Title of program</i> (Version number) [Description of form]. Location: Name of producer. Name of software (Version Number) [Computer software]. Location: Publisher. If the program can be downloaded or ordered from a website, give this information in place of the publication information.

Social media	
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Facebook citation (page)	Community of Multiculturalism. (n.d.). <i>Home</i> [Facebook page]. Facebook. Retrieved October 14, 2020, from https://www.facebook.com/communityofmulticulturalism/ Parenthetical citation: (Community of Multiculturalism, n.d.) Narrative citation: Community of Multiculturalism (n.d.)

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