



**Changing  
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Personalities**

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### **Aims and Scope:**

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

Topics of interest include, but are not limited to

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

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

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## EDITORIAL

# Not to Be Lost in Translation

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### ACKNOWLEDGEMENT

Special gratitude to Natalia G. Popova for her wonderful job in providing linguistic improvement and shaping the key ideas of the article.

This EDITORIAL article *Not to Be Lost in Translation* has been inspired by a number of circumstances. Firstly, it echoes the title of Sofia Coppola's movie (2003), which explored the existential experiences of characters being exposed to a foreign language and culture and seeking authenticity and recognition in the eyes of the Other. Secondly, one of the articles in the current issue discusses the problems of translation from one language to another in the context of turbulent geopolitical developments. Thirdly, and most importantly, ensuring the adequate translation of scientific articles written in multiple languages and addressing a bewildering variety of sociocultural contexts is one of the most urgent topics for *CS&P* as an English-language journal published in Russia.

Below, I will consider some ideas expressed by Paul Ricoeur, a scholar known for developing the hermeneutic approach, in his book *On Translation* (2006), which will help us form a suitable framework for analysis. The issue of translation was mentioned in some of Ricoeur's works due to the obvious overlapping of the process of translation and the nature of interpretation. The book includes several short essays.

In the first essay, "Translation as Challenge and Source of Happiness," Ricoeur describes what he sees as "translation's great difficulties and small delights" (p. 3). When describing difficulties, he uses an analogy drawn from Sigmund Freud's notions of the work of remembering and the work of mourning. In this context, he shows that while a good translation can always accomplish something, some loss is inevitable. Using more examples drawn from Freud, Ricoeur notes that it is always possible to doubt whether the target language really has the capacity to say what has already been said in the source language. Or, putting it differently,

there is always a presumption that what is said in one language cannot be always said in another language. According to Ricoeur, such a presumption is a “fantasy nourished by the banal admission the original will not be duplicated by another original” (p. 5). Such a fantasy, in turn, is strengthened by another fantasy that a perfect translation is possible. In translation, as Ricoeur argues, equivalence is paradoxical, which means that it cannot be completely adequate, since a translator always relies on approximation. Thus, even the greatest and most fundamental works of world literature, such as the Bible or Iliad, always remain subject to retranslation attempts.

In the second essay, “The Paradigm of Translation,” Ricoeur makes a distinction between two senses of translation: the strict sense, in the case of interlingual translation, and the broader sense, in the case of intralingual translation. He argues that interlingual translation shows that it is possible to translate in more than one way; intralingual translation goes further and shows that “it is always possible to say the same thing in another way” (p. 25). Therefore, there can be no absolute test of what is a good translation. At best, what is possible is “an equivalence without identity” (p. 22). This applies not only to translation, but also to speaking one’s native language: “We have only points of view, perspectives, partial visions of the world. That is why we have never ceased making ourselves clear ... to others who do not see things from the same angle as we do” (p. 27); thus, there is “something foreign in every other” (p. 25).

Finally, Ricoeur touches the problem of meaning, which goes far beyond the search for equivalent terms in the target and source languages to imply an understanding—and even direct sensing—of the peculiarities of both sociocultural contexts.

The main topic of the ARTICLE “*So the Last Will Be First*”: *Cancel Culture as an Instrument of Symbolic Policy* by Daniil A. Anikin and Dina D. Ivanova is cancel culture. As a relatively new concept offering a broad range of interpretations, cancel culture is acquiring a new meaning right before our eyes. As a result, it is becoming an increasingly significant topic in academic studies. The authors define cancel culture as a “criticism or condemnation directed at an individual or event, targeting a specific person or group, and relating to the past, present, or future, including actions or statements made in either the real or virtual world.” They specifically stress the role of public space as a prerequisite of cancel culture: while previously a person facing social ostracism could hide that status by changing their physical location, this is no longer possible in today’s interconnected world. The authors distinguish two processes within cancel culture: division, which refers to the act of exclusion, and unification, which involves the development of shared principles within a group. They propose two definitional categories: exclusion, which is linked to the desire to punish the target, and consolidation, which in contrast is focused on the group’s values and practices. The study is based on Pierre Bourdieu’s theory of three types of capital—economic, cultural, and social—each of which could potentially become symbolic. The authors analyze cancel culture as a mechanism in social reality that, on the one hand, highlights the emergence of new positions and power dynamics, while, on the other hand, drives social transformation, resulting in both positive and negative consequences.

Alyona V. Dymova, Natalya N. Koptyaeva, and Thomas A. Beavitt in the ARTICLE *Tendencies of Translation Manipulation Strategies in Anglophone Mass Media: The*

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*Case of the “Collective West”* underline that, in the context of unfolding geopolitical events, multi-linguistic media, translation and social discourse theories have to take rapidly evolving and potentially diverse meanings into account. In particular, due to its status as the mostly widespread language, it becomes relevant to consider whether English is inherently prone to such manipulations. According to the authors, their work “sets out to evaluate the means by which linguistic distortions creep into media discourses by examining a sample of content that features the concept of the ‘collective West.’” Using an interdisciplinary approach, including linguistic and translation studies, discourse analysis, and sociolinguistic methods, they compare the uses of this term in English-language media with those appearing in equivalent Russian texts. Having collected 103 original Russian-language fragments (2022–2024) from Russian and Belorussian news sources containing the key phrase “коллективный Запад” [kollektivnyi Zapad], the authors conducted their comparison with 143 translations appearing in British or American news publications. The analysis reveals five main trends: “(a) subtle tampering in direct quotation; (b) deliberate omission of chunks; (c) imprecise indirect quotation; (d) tampering with the cornerstones of direct quotation; (e) defacing the source of quotation.”

The ARTICLE *On the Way to a Secularized Theology: Why Today’s Disapproval of an Atemporal God Is Gaining Momentum?* by Vladimir K. Shokhin discusses the provocative challenge from Charles Hartshorne who insisted on “Divine relativity”; consequently, the timelessness of God became a general topic of discussion in Western theology of the 20<sup>th</sup> century. Then, Boethius’ classical thesis that “Divine eternity is the perfect possession of the whole fullness of unending life” and is therefore timeless was backed by contemporary physics through the theory of special relativity. As Vladimir K. Shokhin argues, while “the appeal to science did not prove altogether successful, it spurred on the ‘temporalists’ to produce new arguments, which in turn led to new counter-arguments from the traditionalists.” He then analyzes the arguments of those authors who insist that God is eternal to advance the claim that “both parties are, nevertheless, unanimous in the opinion that no evidence for the very nature of Divine eternity is available directly from the Bible (in spite of numerous statements therein that God has neither beginning nor end).”

In the ARTICLE *Saudi National Day: Conservatism Versus Modernity in the Light of Saudi Vision 2030*, Theeb Mohammed Aldossry notices that Saudi Arabia is a society of paradoxes where modernity and tradition coexist at the same time as restraining each other. Today, the Kingdom is witnessing a process of change in its social, financial, and political structures, which are reflected in *Saudi Vision 2030*. As the article shows, the document seeks to create social and economic policies that will enable the country to break its dependence on oil exports, create a prosperous and sustainable economic future, improve lifestyles and social cohesion within Saudi Arabian communities, and lift some conservative social restrictions. Using the annual celebration of Saudi National Day on September, 23<sup>rd</sup> as a case study for analyzing theoretical questions around nationalism and state power, the author seeks to answer the following questions: (a) What are the debates surrounding celebrating Saudi National Day as an element of Saudi Vision 2030? (b) What are the aspects of Saudi

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National Day celebration practices? (c) What are the consequential trends related to the celebration of Saudi National Day?

The ARTICLE *Exploring Social Identities in Indonesia: The Role of Religious and Ethnic Identities in Evaluating Well-Being* by Tery Setiawan, Missiliana Riasnugrahani, Ellen Theresia, Meta Dwijayanthi, and Marissa Chitra Sulastra sets out to investigate the concept of well-being, which has experienced increased scholarly attention in the past decades. The authors emphasize two approaches toward well-being: objective including economic, basic needs, life expectancy, etc. and subjective, namely, assessment of life satisfaction and quality of life. At the same time, the authors, following the argumentation of some researchers who argue that these approaches have limitations, aim “to pursue a more contextual approach to understanding the perception of well-being in Indonesian society by incorporating both individualistic and basic needs into a broader framework of socio-psychological needs.” In the study, well-being is viewed as an intimate concept, thus specifically defined by the individual who experiences it, but at the same time being deeply rooted in particular societies. Employing the notion of relational well-being, the authors hypothesize that religious and ethnical identity is positively related to individuals’ relational well-being. The study is based on a survey conducted from October to December, 2022.

Jahandar Jabarov in the ARTICLE *Sociology of Russophilia in Azerbaijan: A Classification for Russophile Social Groups* indicates that “Russophilia is driven by admiration for Russia’s cultural heritage, political traditions, and geopolitical influence. It is often seen in nations with historical ties to Russia or in groups that support multipolarity in global politics.” Conversely, Russophobia reflects wariness or skepticism toward Russia’s role in global affairs, influenced by historical tensions and geopolitical rivalries. Jahandar Japarov stresses that “Russophilia reflects not just positive sentiments toward Russia but also enduring cultural, linguistic, and ideological attachments that influence social behavior and attitudes at a more profound level.” The study is aimed at exploring the main sociological characteristics and features of Russophiles and providing a classification of pro-Russian social groups in Azerbaijan. The primary means of collecting data to address the research objectives are qualitative methods, particularly unstructured interviews. The research was conducted between 2022 and 2023; a total of 300 potential participants were initially approached face-to-face, and 75 individuals self-identified as Russophiles became the focus of in-depth interviews. The author concludes that there are various Russophile social groups in Azerbaijan, which share commonalities and distinct characteristics.

The ARTICLE *Influence of Globalization on the Transformation of Kazakh Traditions and Culture: A Case Study of Southern Kazakhstan* by Makhpal Syzdykova, Zharkynbek Abikenov, Aigul Abdiramanova, and Elmira Ilyassova underlines that balancing the preservation of traditional culture with the adoption of innovative practices is particularly crucial in Kazakhstan. In the Kazakh society, cultural identity is deeply intertwined with the history of people. In the study, the transformations of the traditional Kazakh culture taking place both under the Soviet rule and in the modern globalized era are explored. At the same time, the authors mention that the modernization process often clashes with efforts to revive and protect cultural heritage.

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The authors formulate the main research goal as determining how global forces such as digitalization and Western cultural integration are reshaping the sociocultural fabric of the Kazakh society. This process can enhance Kazakhstan's global participation while safeguarding its distinct cultural identity and foster a pluralistic cultural landscape where different traditions coexist and enrich the national identity. The collection of raw data was carried out through an online survey in the Kyzylorda, Turkestan, Zhambyl, Zhetyssu, and Almaty regions, as well as the cities of Almaty and Shymkent, which make up the southern region of Kazakhstan. The survey was conducted on the Google Forms platform ( $n = 597$ ) in May and June, 2023.

Zainal Abidin, Eka Putra, Yuliana Hanami, and Sari Angraeni in the *ARTICLE "I Am Not a Corrupt Criminal and What I Did Is Not Corruption!": The Dynamics of Perceptions, Denial, and Understanding of What Corruption Is* note that corruption is a serious problem in Indonesia. They describe the tasks of the Corruption Eradication Commission (Komisi Pemberantasan Korupsi) established in 2004 for "investigating, inquiring, and prosecuting criminals; acting to prevent corruption, and monitoring the implementation of state governance." The authors analyze corruption through discursive psychology, which examines how language and interactions construct and convey psychological phenomena, such as thoughts, emotions, and identities to explore the idea that "corrupt behavior is a multifaceted socio-psychological phenomenon." The current study "investigates the perceptions of corruption perpetrators and the dynamics between their perceptions and the defense mechanisms they employ regarding their corrupt behaviors." The authors argue that perception is a crucial factor in understanding behavior; therefore, examining the perception of corrupt behavior from the perspective of the accused is essential to explaining the underlying mental processes. The study is based on interviews with five convicts serving their sentences in Sukamiskin Penitentiary, a special prison for corruption convicts in Indonesia.

The *ARTICLE Digital Age Pedagogy: How European and Asian Business School Students Perceive Competence-Oriented Education* by Desislava Serafimova, Pensri Jaroenwanit, and Pongsutti Phuensane analyze the changes in educational services due to the widespread use of digital technology. The authors argue that if business schools want to be in tune with the world's leading innovation trends in higher education, they "must meet the expectations of their current and future students, as well as the requirements of the labor market—employers and personnel users—competing not only with traditional academic institutions but also with alternative education systems and online platforms." The authors describe their research interest as focused on considering how students in Europe and other continents perceive the competency-based educational approach. Their goal is "to verify whether significant cultural differences exist in the perceptions of students from Europe (business schools in Bulgaria, an EU member state) and Asia (business schools from Thailand) regarding applying a competence-oriented educational approach in digital transformation."

Shayista Majeed, Sabiya Mufti, Sabzar Ahmad Peerzadah, and Nazir Ahmed Nazir in the *ARTICLE Effect of Conscientiousness and COVID-19-Induced Job Stress on Organizational Citizenship Behavior Among Healthcare Professionals* refer to the studies revealing that healthcare workers who played a key role in battling COVID-19,

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were exposed to work overburden, loneliness, and an elevated risk of infection. It means that COVID-19-induced job stress has thus posed several challenges including high work standards and a tough environment. In assessing the relationship between conscientiousness and organizational citizenship behavior among healthcare professionals during the pandemic, the authors conclude that most conscientious employees reported experiencing higher levels of stress and low job satisfaction due to the changing work context during the pandemic. Paying particular attention to a non-Western cultural setting, the authors assume that cultural differences result in varying behavioral outcomes at workplace; thus, employees may demonstrate different levels of organizational citizenship behavior directed at their co-workers or organization, particularly during the pandemic. It is hoped that the insights from the study will “prove beneficial for such countries where healthcare system is more fragile and prone to collapse during a calamity.” The study was conducted among healthcare employees working across different public hospitals in Jammu & Kashmir, India. The total population under study was 7,151 healthcare professionals; the entire data collection process was executed between May and September, 2021.

In the RESEARCH NOTE *Innovations in Human Resource Management: A Bibliometric Analysis*, Redar Hameed Ali and Alena E. Fedorova note that the integration of technology into the field of human resources plays an important role in the performance of employees and the implementation of changes aimed at enhancing competitiveness. They explore and synthesize the vast array of research literature into the intersection between technology and human resource management in order “to understand the impact of technological advancements on HRM practices, as well as to identify the trends and patterns that have emerged in this field through a bibliometric analysis.” In addition, the study discusses challenges and opportunities in the realm of HR technology suggesting that ongoing innovation and adaptation are essential for organizations to thrive in a rapidly changing business landscape.

The BOOK REVIEW section includes a review by Andrey S. Menshikov of Jennifer Keating’s book *On Arid Ground. Political Ecologies of Empire in Russian Central Asia*, 2022. The book under review “offers a fascinating perspective on the imperial power’s efforts to transform the environment of its periphery.”

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

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

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## ARTICLE

# “So the Last Will Be First”: Cancel Culture as an Instrument of Symbolic Policy

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### ABSTRACT

This article examines the phenomenon of “cancel culture” through the lens of Pierre Bourdieu's theory of symbolic space. This approach allows us to go beyond traditional ethical and political frameworks, connecting cancel culture to the processes of building collective identity through social exclusion and ostracism. In order to establish its boundaries, a community needs to define specific symbolic capital, which is reflected in both unifying symbols and the ways it distinguishes itself from others. This opposition is primarily expressed through negative symbols that help create a distinct identity. Cancel culture functions as a tool in the struggle for symbolic capital, leading to a restructuring of roles within the social landscape. This results in the emergence of four distinct groups: the “canceled,” the “cancelers–initiators,” the “cancelers–executors,” and the “authorities.” The interactions among these groups foster the development of new identities. It is concluded that in today's public space, where virtualization accelerates the creation and dissemination of identifying symbols, various forms of identity are being formed. The process of canceling initiates a dual dynamic: it not only defines the identity of the canceling community but also encourages the communities of those canceled to fight for a positive redefinition of their own symbolic capital.

### KEYWORDS

cancel culture, ostracism, ethics, identity, identification, symbolic space, symbolic politics, community, exclusion

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So the last will be first, and the first will be last.

—Matthew 20:1–16

### Introduction

Cancel culture, a contemporary form of the social phenomenon known as ostracism, has recently fueled a surge in scholarly attention. As cancel culture has evolved, this concept has gradually acquired new meanings and is becoming an increasingly significant topic in academic discourse. The growing diversity of approaches and the wealth of empirical evidence regarding specific instances of cancellation—many of which have destructive effects—necessitate a theoretical analysis. This analysis should focus on defining the mechanisms of understanding and examining the potential consequences for social reality.

Cancel culture most commonly refers to a situation in which “a person or group of people loses support and is subjected to public condemnation in professional or other communities, social groups, and on social media” (Semenenko, 2023; Trans. by Daniil Anikin & Dina Ivanova—D. A. & D. I.). Cancel culture can manifest itself as criticism or condemnation directed at an individual or event, targeting a specific person or group, and relating to the past, present, or future, including actions or statements made in either the real or virtual world. The concept of cancel culture can receive a broad range of interpretations. Its complex structure, which includes chaotic manifestations of certain elements, creates specific difficulties in understanding. One way or another, it can be said that those who are canceled or in the process of being canceled are expelled by a community, becoming outsiders deprived of a voice and agency in the social space.

Cancel culture is a relatively new mechanism that influences society. It is considered that “cancel culture provides average citizens the collective power to demand accountability from powerful, influential, and well-insulated individuals and organizations” (Roldan et al., 2024). The emergence of such an effect is closely related to virtualization, which has provided new opportunities for interacting with information. On the one hand, it involves the recording or preservation of information about an event, including screenshots of posts, video clips, etc., and on the other hand, it involves dissemination. Thus, the context for future cancellation arises not in physical, but in virtual space. The tools made available by the development of the Internet have changed the ways community members interact and expanded their geographical reach, leading to the movement of groups from a local level to a public one. Physical

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space significantly limited the range and timing of information dissemination. Previously, society could not respond quickly to an action or event and meanwhile the information could be distorted or fail to reach its audience altogether. Virtualization does not make an event true, but it accelerates the process, allowing almost anyone with basic digital skills to join the community.

The public space has become a prerequisite for the existence of cancel culture. In the past, a person facing social condemnation or being boycotted could shed that status by changing their physical location, but in the modern era, this is no longer possible.

Further important aspect involves issues of ethics and morality. Each instance of cancellation touches on moral questions inherent in an individual's life, including women's rights, the existence and number of genders, and the marginalization of socially vulnerable groups. Thus, society invokes moral principles by pointing out behaviors that contradict established norms. Campbell (2023) writes,

generally speaking, however, the direct engagement is much more likely to consist in a statement that the shamed person is evil and that whatever he or she has said is evil. It might look like a smug joke or a sarcastic comment, too. The goal is to get the shamed victim's attention and engagement, which are required if we are really going to change someone. (Campbell, 2023)

As a complex phenomenon, cancel culture can be studied in the context of the processes of digitalization of society or the transformation of historical representations. Within the framework of this article, the key objective is to consider the culture of abolition as one of the mechanisms of symbolic politics that can be used in modern public space to form new identity practices and establish/remove boundaries between communities.

### **Cancel Culture in the Context of Collective Identity Formation**

Within cancel culture, two processes can be observed: division and unification. Division refers to the act of exclusion, where clear boundaries are drawn between groups, while unification involves the development of shared principles within a group. This distinction leads to two categories of definitions: exclusion and consolidation. Exclusion is linked to the desire to punish the target, and the focus is made primarily on the practices directed at them. In contrast, consolidation emphasizes the value of unification to achieve a specific effect, with the focus being made on the group's values and practices. In both cases, the analysis accentuates the functional aspect, where one side dominates, resulting in the diminishing significance of either the excluded or the excluding party. Both processes are closely interconnected—"to separate in order to create,"—where one gives rise to the other. As D. Shar points out,

in its refusal to take sides, its embrace of complexity and nuance, its insistence on neither denying nor centering various categories of identity, and its focus on the

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need to work on changing the self and the world at the same time, the integrated perspective truly runs against the grain of our modern political and activist and outrage culture. (Shar, 2024)

However, the logic behind the construction of a “negative identity” is somewhat different, as it involves achieving internal unity in the community by constructing the identity of those who do not belong to that group.

Differentiation is one of the principles of community building. In order to establish interaction or non-interaction, its members are compelled to create symbols and signs that distinguish “us” from “them.” “The depth of such divisions can be assessed by looking at the forms of interaction among social actors—from dialogue to confrontation, conflict, and alienation—and the nature of their reflection in group identities” (Semenenko, 2023; Trans. by D. A. & D. I.). In cancel culture, a key condition for division is depth, specifically a mandatory state of conflict in which dialogue is impossible. The canceled individual may lose their previously acquired titles, be erased from public discourse, have their work discredited, be barred from attending public events, and even face the loss of their freedom. Examples may include boycotts of films made by certain directors or publishers’ refusal to work with certain writers.

However, exclusion is often less about the desire to “get rid” of someone and more about establishing and protecting one’s own boundaries. Interestingly, until the moment of the statement or action that later “provokes” the cancellation, the community not only does not exist but is also unaware of any need for it. The “I do not agree” acknowledgment serves as a turning point and lays the groundwork for forming a new community. This new community establishes its identity by creating negative symbols that are directed at the opposing group. Importantly, “canceling individuals and organizations may not be enough to secure lasting positive change or make the target of canceling change their position at all” (Roldan et al., 2024). The concern lies not only in the objectives of social ostracism but also in the methods it employs in modern collective interactions to gain public support.

Each community will have its own symbolic set; however, each individual member must personally connect or relate those symbols to themselves. For example, the unifying factor behind the canceling of J. K. Rowling, the author of the Harry Potter fantasy series, is support for transgender individuals (Stack, 2019). The author posted several messages on social media stating that she does not support the introduction of new gender designations, which resulted in attempts to cancel her. It is noteworthy that a key aspect of the rise of cancel culture is the manipulation of ethical norms commonly associated with what is known as “new ethics.” According to A. A. Guseynov,

the new ethical perspective emphasizes the inadmissibility of imperial (racist, colonial, sexist) prejudices in the public atmosphere, even in cases of their weak manifestations and isolated incidents. What is new here is that ethics, when expressed on a personal level, becomes truly meaningful and universally significant, avoiding alienation or distortion. As a result, a radical shift happens: the moral perspective on the world moves not from the general to the particular, but from the particular to the general. (Guseynov, 2021; Trans. by D. A. & D. I.)

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In a socio-philosophical context, this statement means that the local values of a particular community are imposed on other communities, which inevitably leads to sharp fractures in various segments of the social space.

Without negative qualities, the canceled individual, in and of themselves, is not interesting to future members of the community; however, once these qualities are identified, the canceled gain particular significance, serving as a negative symbol. Interestingly, the image of the victim often takes a backseat. Members subsequently joining the community may not even be fully aware of the situation, yet they become part of it simply because the symbol exists. Quite illustrative in this respect is the case of Hollywood producer Harvey Weinstein, who was convicted of rape and numerous instances of harassment. Despite the fact that the accusations came from other prominent individuals, Weinstein's persona carried primary symbolic significance. This has led to a social phenomenon known as the Weinstein Effect, which refers to the widespread accusations of sexual harassment against well-known figures (Stelter, 2017).

The emerging communities generate symbolic support, which includes hashtags on social media, such as the names of social movements (#BlackLivesMatter<sup>1</sup>, #MeToo<sup>2</sup>), calls to action (#RIPJKRowling), and slogans ("Hands up, don't shoot," "No justice, no peace"). Gestures are also prevalent, one of which is the raised fist, symbolizing freedom in relation to the Black community. As A. A. Guseynov (2021) puts it, "cancel culture places a spotlight on issues, such as sexism, racism, and abuse, that may push or encourage people to become informed on the gravity and nuances of the issue itself." It should be noted that each of the above-mentioned movements has its own distinct set of symbols, aimed at consolidating the community and positioning it against those communities that are viewed not just as "others," but as "alien" or "hostile."

The symbolic component becomes crucial in these processes because members of the newly formed group cannot be united by specific internal characteristics. They may differ in physical attributes, cultural experiences, or social statuses. The internal symbols that individuals share are potential rather than mandatory.

A good example in this respect is the cancellation of American actor Johnny Depp, who was accused of domestic violence (Arkin, 2022). In this case, the likelihood of joining the canceling community is highest, first among those who are victims of violence or actively fight for their rights, and second among fans or anti-fans who are immersed in the actor's information landscape and have a certain initial stance towards him. When looking at the community that canceled Johnny Depp, it is clear that it included both fans and critics. This group eventually aligned with the movement #MeToo, which condemns violence and harassment. Thus, those who have some personal experience related to the statement or who have been part of the general information flow surrounding the object of cancellation are most likely to become part of the canceling group. To gain a deeper understanding of the specifics and

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<sup>1</sup> <https://blacklivesmatter.com>

<sup>2</sup> <https://metoomvmt.org>

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role of cancel culture in social spaces, we are going to turn to P. Bourdieu's concept of symbolic politics.

### **The Structure of Symbolic Space and the Mechanisms of Social Exclusion**

Considering social space as a "multidimensional space, an open set of fields that are relatively autonomous" (Bourdieu, 1985), we can also speak of an inherent fragmentation within this space. While earlier we referred to differentiation that forms groups, here we mean the heterogeneity of the social fabric. Fields with their unique properties will influence the formation of communities. Importantly, "fields have a history and only have meaning in the framework of differentiated societies. Hence there are societies 'without fields' (just as there are societies 'without a State', 'without writing', 'without schools', etc.)" (Hilgers & Mangez, 2015). Cancel culture has become a mechanism that transforms the structure of social fields, creating new positions and relationships between them. This transformation is supported by the high degree of differentiation in contemporary social spaces.

To begin with, let us examine the existing positions in the context of cancel culture. In his exploration of the field of literature, P. Bourdieu explains that each position is objectively determined by a system of significant properties. These properties define how each position relates to others within the overall structure of property distribution (Bourdieu & Wacquant, 2013). The agent's behavior is dependent on the position they hold. At first glance, it may seem that cancel culture involves only the relationship between two positions, namely the "cancelers" and the "canceled." However, reducing it to these two basic elements limits our understanding of the system of relationships and the mechanism itself, failing to provide a complete picture. Instead, four positions can be identified: the "canceled," the "cancelers–initiators," the "cancelers–executors," and the "authorities."

The first position to be considered is that of the "canceled." As previously mentioned, this refers to the individual or group through whom a new community of the canceled is formed by exclusion. However, not every actor can serve as a negative symbol capable of becoming a focal point around which the community's identity can be built. It is important that the canceled should possess a certain amount of symbolic capital. Otherwise, building relationships is not worthwhile, as there is no resource to invest in. Once outside the community, the canceled individual is partially or completely deprived of their capital. The actor's reputation sharply declines, and they cease to be an active participant in virtual space, as any of their posts are subjected to "complaints," negative comments, and restrictions on basic electronic transactions, including payments and others. The most extreme form of such cancellation can be the blocking of an account. In the modern world, this can be compared to the "murder" of this person, as profiles and their management on social networks have gained such high value that they are comparable to an equivalent of human life, often experienced more fully than in reality. Restrictions also apply to physical space. The actor may face bans on visiting certain locations, or information about their whereabouts may be disclosed, creating a threat to their safety. In this position, people are often forced

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to suspend their online channels and leave the virtual world for a while, as they lose capital and can no longer use their previous means of influence.

Cancelers are the most complex element to understand, as they comprise two communities: cancelers–initiators and cancelers–executors. In their eyes, the system of views and beliefs of the canceled individual (either personally or as a representative of a specific community) poses a threat to social reality and requires unification to eliminate it. The shared motives and collaborative efforts of the cancelers–initiators and cancelers–executors can sometimes provide a reason for their unity; however, there are still notable differences between their positions.

An important point to clarify is how to define “cancelers–executors.” These are Internet users who are the first to express dissent in the public space. They are the ones who post comments, give dislikes, and create groups on social media to condemn statements that contradict their moral foundations, which ultimately becomes the basis for social organization. This group will include fans and anti-fans who have shared similar life experiences, as well as those who, for various reasons (professional, social, etc.), are included in a common living space. This group tends to be the most spontaneous, minimally controlled, and unstable, as it emerges in response to circumstances and can transition to a new qualitative level in exceptional situations.

To ensure their existence as a community, cancelers–executors need to strengthen their position by assigning a negative value to the actor and stripping them of social support—capital. The group’s independent strength, amplified through virtualization, has limitations when it comes to canceling the actor. A solution may be to attract the capital of other communities that are interested in participating. For instance, the resources of the #MeToo movement were actively involved in the cancellation of Johnny Depp. He lost the opportunity to express himself professionally, temporarily losing advertising contacts and film offers. In some cases, we can speak of an autonomous struggle for capital that does not involve a third party, where a transition to a new qualitative level occurs through the independent strengthening of the group via institutionalization. The community gets hold of capital, gaining its own place and goals in the social space. Returning to #MeToo, it should be noted that its emergence is linked to a shift in the status of existing capitals, which underpinned the movement’s creation. However, this situation is a rare exception rather than the rule. This is related, first, to the complex organization of the process, and second, to the need for ethically-oriented groups to carve out their own space in a competitive environment, even when their views are similar. This suggests that attracting resources from a third party will be the most accessible way for the canceling group.

The cancelers–initiators can be understood as institutionally established communities that possess a well-defined symbolic capital, as well as a set of social practices that exist and are repeatedly applied to maintain identity. These are the groups that will hold the power to cancel. The lack of sufficient capital prevents the cancelers from implementing their decisions. To do this, they require an additional community that possesses the necessary resources. These include public organizations aimed at protecting certain segments of the population, addressing urgent social problems, and preserving the memory of events of collective value. It is their capital that will be used

not only in the act of canceling but also in constructing the community of cancelers. In this case, the point of the matter lies not in uniting communities, but in attracting additional strength.

These groups are associated with a specific value vector that characterizes them in social space (e.g., the movement Black Lives Matter condemns racism and violence against Black individuals, while #MeToo condemns violence and sexual harassment). If we take a closer look at the relationship structure, we will see that the community of cancelers–executors invests capital into the community of cancelers–initiators. In this case, it would not be right to speak of their complete unification, but rather of a beneficial exchange, where the former sustain their viability through investment, while the latter create opportunities for their own existence through attraction. It may seem that the cancelers–executors do not need intermediaries, as their capital allows them to act directly. However, the community of the canceled provides them with strength by increasing their “social capital” and offers essential quantitative support, reducing the need to constantly search for potential individuals that could be canceled.

“Authorities” make up the fourth position and include those who hold the formal rights to cancel. While earlier changes were related to symbolic manifestations, here they imply real sanctions. Within this position, the executing actors have the power to use force. These actions affect both symbolic and physical spaces, consisting of specific punishments such as fines and arrests, for instance, Harvey Weinstein’s prison sentence and John Lasseter’s dismissal (Lee, 2017). It is to the “authorities” that the cancelers–executors appeal, seeking to enforce public punishment that is approved not only by society but also formally by law, thereby securing a final victory and reinforcing their capital. In addition to the state, which holds the greatest amount of power, it is important to note other executors such as publishing houses, film companies, festival organizers, and so on. Even though the position of “authorities” is a strong position in cancel culture, it is also the most formal and simultaneously the most dependent: the state relies on communities that create a risk of instability, while other organizations depend on the potential for loss. Both elements have to adjust in order to maintain their position.

A significant advantage for the executors is the strategy that benefits the cancelers–executors. Bourdieu posits that the whole range of symbolic strategies can be fitted between two extremes: insult and symbolic imposition. The executors most often operate at the level of insults, sending messages or posting negative content. The cancelers–executors will have access to

an act of symbolic imposition that has behind it all the strength of the collective, the consensus, the common sense, because it is performed by a delegated agent of the State, the holder of the monopoly of legitimate symbolic violence. (Bourdieu, 1985)

Thus, the diversity of communities and their inherent value orientations generate a natural need to establish influence, which inevitably leads to conflict. Capital serves as a tool for strengthening power or manipulating society to achieve one’s goals.

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By striving to establish their own ethical rules in the social sphere, groups seek to achieve a dominant position. This dominance is understood as the concentration of the largest share of capital in the hands of the community compared to others or the predominance of capital that is most valuable in a particular field. This enables the group to establish control over a specific resource and alter the value of each one. As a result, the main goal of communities is to acquire the necessary capital, which leads to the differentiation of both social and symbolic spaces. A key feature of this differentiation is the division between a symbolic center and a symbolic periphery (Zevako, 2023).

Pierre Bourdieu, who most often identifies three types of capital—economic, cultural, and symbolic—notes that different types of capital, like trump cards in a game, represent power that determines the chances of winning in a given field. The struggle, in which each community aims to create its own vision of the world, requires active efforts focused on acquiring and securing certain forms of capital (Zevako, 2023). Communication channels will play a significant role in this symbolic appropriation, enabling the reproduction and reinforcement of a specific image of both the present and the past, as can be seen in the example of the memory of the Soviet Union (Ivanov, 2024). For cancel culture, the most advantageous form is symbolic representation, as the actions of various positions are primarily linked to reputation, the representation of individuals or groups, and the play of meanings. Cultural and economic capital are secondary to symbolic capital, as they complement it and provide certain advantages to their holders. Cancel culture, defined as the act of stripping capital from one group while enhancing it for the cancelers—initiators and cancelers—executors, is exemplified by the Golden Globes scandal, where several celebrities refused to attend the ceremony because there were no Black members on the jury (Lee, 2021). The reference to the past experiences of competing communities is particularly important for legitimizing the existing redistribution of capital. This is evident both at the international level (e.g., attempts to redistribute symbolic capital for victory in World War II) and at the local level, where fragmented places of memory serve as vivid testimonies to the struggle for a significant past (Golovashina, 2022).

This case also illustrates how the dominant community is capable of altering the value of capital. The rise of cancel culture has led to shifts in how capital's significance is distributed across different fields. Recalling another film award, we can trace the transformation in the value of capital positions. While a couple of decades ago, a director focused primarily on thematic elements when making a film, starting in 2024, the rules for winning the Academy Award have been rewritten. One of the new criteria now is that “at least 30% of all actors not submitted for consideration are from at least two underrepresented groups which may include: Women, Racial or ethnic group, LGBTQ+<sup>3</sup>, People with cognitive or physical disabilities, or who are deaf or hard of hearing” (Academy of Motion Picture Arts and Sciences, n.d.), which indicates a transformation in the understanding of cultural capital itself and its significance for

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<sup>3</sup> The international LGBT public movement is recognized as an extremist organization, with its activities banned on the territory of the Russian Federation. Международное общественное движение ЛГБТ признано в России экстремистской организацией, чья деятельность запрещена на территории РФ.

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positions. This change is becoming a standard for both the film industry and other fields, including literature, science, and more.

When discussing the struggle for capital, it is important to understand that despite the involvement of all positions, the primary participants in the clash of cancel culture will be the canceled and the cancelers—executors, due to the clearer value boundaries they establish. The formation of a community based on negative identity can lead to a backlash effect, where the exclusion of the “other” prompts the emergence of a new group. In response to the emergence of the canceling community, a community of the canceled emerges. For example, the attempt to exclude Johnny Depp and J. K. Rowling from social space resulted in the formation of a community of the canceled: in social media, hashtags such as #JusticeForJohnnyDepp and #IStandWithJKRowling have started to spread widely as symbols of the emergence and strengthening of such a community. The latter is built not as an initial supporter of certain values, but as a reaction to the awareness of their prohibition, an attempt to eliminate the dominance of these values in the social space. As the community of the canceled is constructed, it becomes an active and legitimate player in the struggle. Its capital growth poses a direct threat to the cancelers, endangering their very existence. Losing the support of the cancelers—executors, the canceling community is bound to fall apart.

### **Virtualization of Symbolic Space: Social and Political Significance**

Having identified the positions and relationships between them, we need to consider the place of their action and implementation. According to Bourdieu, there are two types of space: physical and social. “Just as a physical space is defined by the mutual externality of parts, social space is defined by the mutual exclusion (or distinction) of positions which constitute it, that is, as a structure of juxtaposition of social positions” (Bourdieu, 1998). Physical space becomes literally connected to the structure of the city, while social space is linked to an abstract understanding shaped by fields. Virtualization creates yet another space that functions as a social construct, where relationships between social positions are formed. This space will be primary for both the cancelers and the canceled.

It would be more appropriate to talk about the correlation between physical and virtual spaces, within which the social, with its inherent positions, is realized. Virtuality in this case creates specific conditions and new tools for action. In the context of cancel culture, the construction and existence of communities relies on the hashtag method, which is based on spreading a statement or call to action on social media with the help of a specific symbol. Often, moral categories such as justice, peace, and others are initially embedded in it. Likes, reposts, hashtags, and other forms of capital competition can create a multimillion community within a few hours. In this case, physical space is a secondary site of realization, where the actions of the canceling community can be observed. In the context of cancel culture, it is impossible to unify positions according to where people live, including neighborhoods, streets, and other geographic factors. However, the apparent spatial chaos of physical and virtual spaces does not negate the symbolic places that confirm the existence of communities.

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“Appropriated space is one of the sites where power is asserted and wielded, and no doubt under the most invisible form, that of symbolic violence as unperceived violence,” Bourdieu (2018) writes. The presence of such places indicates the success and establishment of a community within social reality. In physical space, which can be seen as a “projection of social space” (Bourdieu, 1998), the transformation of sites of memory stands out as significant. In this case, a common practice for affirming a community is the demolition or installation of monuments. In 2020, members of the Black Lives Matter movement destroyed and threw into the water the statue of British businessman Edward Colston, who built his business on the slave trade (Sullivan, 2020). The previously uncontroversial fact has now become a means of strengthening a new community, not just through destruction, but as part of a full-fledged ritualistic act. The justification in the physical space of the #MeToo movement was, on the contrary, the erection of a monument not in the form of a specific person, but rather a snarling burgundy puma (Campano, 2019).

Virtual space, operating outside the realm of physical objects, also has symbolic places for the community. The most obvious example is the creation of groups on social media, where participants state their goals and post relevant news, while victims share their stories. These communities even have their own geographic location in the virtual space in the form of IDs. However, the most interesting place is the account of the one being canceled. It acquires special significance during the cancellation process, becoming associated with the symbol of negative identity. The personal page on social media is targeted by the attacks of cancelers in the form of comments, negative ratings, and so on. The ability to deform social space becomes an indicator of success, which can be measured in the physical realm, through the demolition and creation of monuments, while in the virtual realm, it manifests as the takeover of a profile, denial of access to it, or attempts to establish complete control over the actions or statements of its owner.

Cancel culture functions as a mechanism in social reality that, on the one hand, highlights the emergence of new positions and power dynamics. On the other hand, it drives social transformation, resulting in both positive and negative consequences. The desire to help oppressed social groups sometimes leads to the use of aggressive tactics to assert certain positions, which not only fail to solve the problems but actually make them worse. Preservation of a community’s identity becomes dangerous for all participants involved in the process. The negative consequences manifest on two levels: collective and individual. On the collective level, an aggressive approach to boundary-setting turns divisions into deep societal rifts. I. S. Semenenko argues that “divisions and fractures indicate the processes of the social fabric’s breakdown and its transition to a new state” (Semenenko, 2023; Trans. by D. A. & D. I.). However, in the case of cancel culture, they lead not to qualitative changes but to endless processes of separation, where the speed of transitioning from one position to another increases, and the manipulation of ethical categories grows, creating tension in the social space. This situation results in pseudo-solidarity, providing a temporary illusion of unity, in which the aggressive nature of methods used becomes very real and dangerous.

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The attempts to cancel J. K. Rowling reached a point where those calling for her cancellation launched the hashtag #RIPJKRowling, which literally implies a metaphor of the person's assassination. The situation escalated to the point where exclusion manifested not only on a social level but also on a physical one: the writer's address was leaked online, and she began receiving death threats (Stolworthy, 2021). This example illustrates the personal level, where an individual is stripped of their fundamental sense of safety. The rapid shifts in social dynamics mean that anyone could suddenly find themselves among the canceled, with the tools that appear to offer protection out of their reach. As a result, someone may unknowingly find themselves excluded from the community. This uncertainty forces people to navigate a delicate balance—either suppressing their own values and offering insincere apologies to maintain solidarity, or standing firm and risking social exclusion. Those who hold different views are faced with a difficult choice: either confront and defend their beliefs, risking being canceled, or conform and risk compromising their own integrity.

## Conclusion

The increasing role of virtual elements in the quest for symbolic capital significantly impacts both social and political processes. In today's public space, the development of international relations is also influenced by virtual communications that contribute to the formation and maintenance of negative identities. An important task in studying these processes in the context of Pierre Bourdieu's symbolic analysis is to examine both the content of public boycotting practices and identify the actors interested in reconfiguring social space through canceling methods.

It is worth noting that the prospects for studying cancel culture as an element in the formation and transformation of collective identities highlight the duality of the process of negative identification. On the one hand, the construction of negative symbols helps consolidate the canceling community. However, paradoxically, the increasing number of cancellation criteria contributes not to the fragmentation but to the consolidation of the canceled community. To be more precise, individuals appropriate imposed symbols, recode them, and then use them as the foundation for a new identity. This new identity may have been completely absent or only in its early stages when the canceling process began. The gradual weakening of the symbolic resource of the canceling community, which blurs the boundaries between perpetrators and victims, also contributes to the intensification of these processes, leading to the construction of fundamentally different contours of the symbolic space.

In a well-known parable from the Gospel of Matthew, Jesus likens the Kingdom of God to a vineyard, emphasizing through the phrase "the last shall be first" that there are no barriers—whether age, nationality, or social status—to embracing piety. However, in contemporary social reality, this phrase takes on an entirely different meaning, reflecting the dialectic of identity formation, where no position in the symbolic space can be permanently assigned to a particular community. Canceling turns out to be a double-edged sword, not only helping to restore justice but also creating new communities of the offended who seek symbolic redemption.

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ARTICLE

## Tendencies of Translation Manipulation Strategies in Anglophone Mass Media: The Case of the “Collective West”

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### ABSTRACT

Especially at times of conflict, questions concerning the accuracy of texts published as translations are of interest in fields including sociology and international relations due to their role in facilitating—or forestalling—the possibility of resolving such conflicts. In order to examine why texts asserted as translations are not always accurate, we analyze tendencies in mistranslation. To this end, we sampled texts containing the key term “collective West” from Russian news sources and their translations in Anglophone mass media. Using a comparative interpretation method within contextual and discursive theory, we noticed numerous discrepancies and distortions, which allowed us to identify key tendencies in mistranslation. Five main tendencies identified from the analysis are: (a) subtle tampering in direct quotation; (b) deliberate omission of chunks; (c) imprecise indirect quotation; (d) tampering with the cornerstones of direct quotation; (e) defacing the source of quotation. The results of our research reveal the manipulative character of such mistranslations.

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collective West, translation distortion, news translation, ideologeme, mistranslation, linguistic manipulation, international relations, Anglophone media, misquotation

**Introduction and Literature Review**

Especially at times of geopolitical turmoil, languages undergo shifts, which become embedded in particular semantic meanings that are subsequently attached to certain words and phrases. Depending on the position of a given protagonist in an unfolding conflict, as well as the eventual outcomes of such conflicts, a particular term may acquire a positive or negative connotation. This in turn depends not only on one's opponent's interpretation of the semantic meaning of this term, but also on one's own perceptions of the opponent's interpretation. Since, in addition to involving opposing perspectives, media coverage of geopolitical developments takes place in multiple languages, involving the near-simultaneous translation of the news media of the other participants in the conflict, it becomes necessary for translation and social discourse theories to take such rapidly evolving and potentially diverse meanings into account.

While many linguists proceed according to the assumption that "language is a natural growth and not an instrument which we shape for our own purposes," this position has been criticized as leading to the "abuse of language" (Orwell, 2013). Such abuses are especially likely when occurring in political contexts, memorably characterized by George Orwell, and discussed in a previously published paper, as "a mass of lies, evasions, folly, hatred and schizophrenia" (Beavitt, 2021). In other previous research, the unique position of the English language in global communication was considered both in terms of its serving as an interlingua to conduct international scientific communication, and concerning whether such a role may involve elements of linguistic imperialism (Popova & Beavitt, 2017). Given these identified tendencies, it becomes relevant to examine the extent to which linguistic shifts result in the context of international conflicts due to hostile manipulations, as well as to consider whether the English language itself is inherently prone to such manipulations.

Perceived hostile linguistic manipulations are not always limited to countries defined as "unfriendly," but, as a result of the rapid dissemination of media content by international news agencies, can also appear in the media of ostensibly neutral or even "friendly" countries. For example, in a rebuttal issued by the Russian Ministry of Foreign Affairs, India's English-language media are alleged in their coverage of the present Ukrainian crisis to "blindly reprint articles on foreign policy events from biased foreign news agencies, such as AP<sup>1</sup>, AFP<sup>2</sup>, Bloomberg<sup>3</sup> and Reuters<sup>4</sup>, which present news in the anti-Russia spirit and often publish bare-faced disinformation and

<sup>1</sup> <https://apnews.com>

<sup>2</sup> <https://www.afp.com/en/news-hub>

<sup>3</sup> <https://www.bloomberg.com/europe>

<sup>4</sup> <https://www.reuters.com>

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fake news” (Unreliable publications, 2023). While such rebuttals cannot themselves always be taken at face value, the example serves to highlight the global nature of manipulation, disinformation, and fake news creation techniques in mass media, especially when carried out in the English language.

The present work sets out to evaluate the means by which linguistic distortions creep into media discourses by examining a sample of content that features the concept of the “collective West.” To inform our comparison of the uses of this term in English language media with those appearing in equivalent Russian texts, we will take an interdisciplinary approach that blends linguistic and translation studies techniques with discourse analysis and sociolinguistic approaches.

Since the translation of political media texts serves not only as a means of communication but also as a tool for manipulation and ideological framing, the intersection of linguistics, political science, and media studies has attracted significant scholarly attention. While Norman Fairclough (2013) and Teun A. van Dijk (2013) describe how discourse and ideology interact in political media texts, Mona Baker (2018), Jeremy Munday (2007), and Anthony Pym (2023) explore the theories and practices of translation in terms of its impact on political communication and public perception.

According to Ali Darwish, “by submitting news to translation it undergoes a reframing process entailing a reconstruction of a constructed reality already subjected to professional, institutional or contextual influences” (Darwish, 2010, p. 52). Darwish observes that Western journalists first gather and package foreign news for use as source material, which is then subjected to reframing as a means of adapting news reports to conform to their editorial policy. While some framing and reframing may occur within translation processes themselves, the directed work of sub editors can often play a more significant role in the context of news reporting. However, for the purposes of our analysis, “translator” and “translation” will refer not only to the linguistic activity of professional translators, but also to the editors whose work shapes how such “translations” appear in the form of published texts.

According to Rima Malkawi (2012), translation processes are affected by an *ideological stamp*:

It can be argued that in news media the ideological stamp is not only selective and manipulative of the translation in news media of political discourse, but it also affects the accuracy in the translation process and causes mistranslation. Such mistranslation must be distinguished from mistranslation caused by the level of incompetence of the translator and/or the limitation of the process itself. (p. 38)

Mistranslation may also occur as the result of deliberate manipulation. In contrast to the ostensible primary purpose of translation, which is to accurately render the *meaning* of the source text into the target text, *manipulative translation* has the opposite aim. Lada Kolomiyets (2020) points out that this involves “the idea of conceptual deformation of the source text and, as a result, the objective of subversion of the source-text message(s)” and can be referred to as “propagandistic translation” (p. 368). Zulfira Chanysheva (2017) argues that making deliberate mistakes has non-

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linguistic or ideological motivation to manipulate mass consciousness, which may be considered as an act of ideological sabotage to establish control over the informational space of the audience (p. 65). Among potentially manipulative techniques used in political translation and described in the literature are additions and omissions (Khanmohammad & Aminzad, 2015), combination of reframing and translation, manifestation of conflicts in political ideologies (Kaplunen et al., 2020), evaluation in naming (Munday, 2007), and many others.

In the present work, we consider this set of problems on the example of the phrase the “collective West,” or “коллективный Запад” [kollektivnyi Zapad] in Russian, currently used by both main protagonists in the geopolitical proxy conflict currently centred on Ukraine, but sometimes to connote quite varying (self-)conceptualized entities. In a recent work, we demonstrated that the ideologeme “kollektivnyi Zapad”—along with its English version the “collective West”—carries a negative connotation, comprising the components *confrontation*, *aggression*, *hegemony*, *decline*, *hypocrisy*, etc. (Dymova & Koptyaeva, 2024). We noticed that, when translating Russian statements including the term the “collective West,” Anglophone media apply various techniques of linguistic manipulation (depersonalization, personification, distortion in translation). For this reason, it was necessary to carry out further research to reveal the tendencies of mistranslation. To this end, a bilingual sample of different uses of this term, obtained from a representative number of Russian and Anglophone news sources, is analyzed. From the analysis, five main tendencies are identified. These form a basis for a consideration of the nature of the manipulation techniques themselves, as well as a discussion of what they may be trying to achieve.

Along with being relevant to professional and theoretical linguists, a deepened understanding of such differences and changes in the meanings of terms associated with conflicts and changing international contexts, including those that involve both intentional and unintentional manipulation (Akopova, 2013), may be of interest to government policymakers, as well as decision makers working for companies involved in international trade, NGOs, etc.

## Methods and Materials

For the sample, we collected 103 original Russian language fragments, which date from 2022 to 2024, from Russian and Belorussian news sources containing the key phrase “коллективный Запад” [kollektivnyi Zapad]<sup>5</sup>. All of the fragments are thematically united by their focus on the nature of political and economic interactions between Russia and the West as representing a major field in which the term “коллективный Запад” (phonetically “kollektivnyi Zapad”, meaning “collective West”) is applied. These were then compared with 143 translations appearing in British or

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<sup>5</sup> The original Russian statements were taken from: [TASS](#), [RIA Novosti](#), [Rossiyskaya Gazeta](#), [Izvestiia](#), [RBC.ru](#), [Interfax](#), [Lenta.ru](#), [Vedomosti](#), [Gazeta.ru](#), [Regnum](#), [BFM.ru](#), [Radio Sputnik](#), [MIR24](#), [Voennoe Obozrenie](#), [Vechnyaya Moskva](#), [Argumenty i Fakty](#), [Komsomolskaya Pravda](#), [Parlamentskaya Gazeta](#), <https://government.ru>, <https://mid.ru>, <https://kremlin.ru>, [https://t.me/medvedev\\_telegram](https://t.me/medvedev_telegram), <https://t.me/tikandelaki>, <https://soyuz.by>, <https://www.belta.by>.

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American news publications and featuring the term the “collective West” (or its several variants)<sup>6</sup>. The samples were then analyzed using a comparative interpretation approach according to contextual and discourse theory. From this larger sample, representative fragments were selected to inform the analysis and discussion.

In this research, following the widely accepted definitions of “discourse” by Nina D. Arutiunova (1990), Fairclough & Wodak (1997), van Dijk (2008), etc., we analyzed the sampled material with an emphasis on the social, interactive, and contextual nature of discourse as essential to understanding linguistic facts. In this respect, the discourse theory of Laclau & Mouffe (2001) was of particular importance due to its establishment of a framework for investigating how discursive practices shape politics and how the concept of “hegemony” influences dominant narratives. Consequently, it is by means of discursive analysis that we were able to obtain an insight into the application of the term the “collective West” across different discourses, focusing on the covert translation manipulations and their ideological implications.

Likewise, contextual theory, closely connected to discourse theory and extensively discussed by Michael Halliday (1992), allowed us to evaluate equivalence of translation in the sample, that is to say, whether equivalence of meaning as equivalence of function is established in each particular context. In other words, when analysing the sample, we took into consideration that each item from the original statement has a variety of equivalents in the translated version, but that each is “contextually conditioned,” thus contributing differently to a particular discourse.

Integrating both contextual and discursive theories, the following 5-step methodological approach was formulated to ensure an in-depth examination of the sample: (a) selection of the sample; (b) categorisation into five tendencies; (c) contextual analysis of equivalence; (d) discursive analysis of translation manipulations; (e) synthesis of the data from the previous steps.

## Textual Analysis

The phrase “коллективный Запад” (phonetically “kollektivnyi Zapad”) typically translated into English as “collective West,” almost universally preceded with “the,” became prominent in the post-Soviet era as a means to describe the perceived unified stance of Western nations—primarily the States and European countries—on geopolitical issues that involve Russia and its actions on the global stage. According to Giogio Comai (2023), this term was preceded by the expression “our Western partners,” which is “supposedly neutral, but in context often deprived of positive connotations” (p. 2).

In the political texts considered in this study, various stylistic devices are identified as playing a role in the (mis)representation of the term the “collective West.” For example, enclosing the phrase in quotation marks may indicate the author’s disagreement with the term, their ironic attitude towards it, or the limited circle of

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<sup>6</sup> BrE: [Reuters](#), [The Guardian](#), [Sky News](#), [The Independent](#), [The Mirror](#), [Daily Mail](#), [The Sun](#). AmE: [AP News](#), [The New York Times](#), [POLITICO](#), [Fox News](#), [NBC News](#), [CNN](#), [U.S. News & World Report](#), [CNBC](#), [HuffPost](#), [Bloomberg](#), [Newsweek](#), [The Daily Beast](#), [Foreign Policy](#), [USA Today](#), [Los Angeles Times](#), [The Washington Post](#).

people who are understood to use it. Additionally, as demonstrated in some of the examples used in this paper, quotation marks may be used when the term is paired with markers like “the term” or “the concept.” The term can be written with capital letters in both words (“Collective West”) or lowercase: “The *collective west* wants to divide our society” (Guilbert, 2022). Significantly, there can also be different versions of translation of the same Russian statement “Коллективный Запад пытается расколоть наше общество” (Stenogramma vystupleniia, 2022), e.g., “*The West, collectively*, is trying to fracture our society” (Ruiz, 2022).

In disavowing the term the “collective West” altogether, English-language media may employ various other designations to refer to what appears to be the same entity (i.e., as opposed to the Global South, Eurasia, the Muslim world, the East, etc.): “the Western world,” “the western countries,” “the West,” or, more euphemistically, “the international community.” Even the simple first-person plural pronoun “we” can frequently be used to carry this semantic burden, especially when typically coupled with modal verbs like “can” and “should.”

In some cases, Anglophone media attempt to explain the term the “collective West” to their readers from Russia’s assumed perspective:

The stakes are rising as Russia seeks to paint its war in Ukraine as a battle against the liberal democracies of what it calls the “collective West.” (Belton & Rauhala, 2023)

They use that term in describing their conflict against the collective West, which in their mind is the United States and all of the so-called “vassal states” that in their mind we control. (Transcript: World Stage, 2023)

### ***Tendency 1. Subtle Tampering in Direct Quotation***

One of the manipulative tendencies associated with direct quotation is misquotation. This occurs when some statement is represented as if it were a *precise* translation of the original in quotation marks, when in fact some details have been changed in it. Due to their probable lack of knowledge of the source language, target readers are unlikely to notice that something has been altered, since, more often than not, such changes are *subtle* and not immediately apparent.

Various devices used in the course of subtle tampering with the meaning of the original quotation may include omitting words (Quotes 1–3, 5, 8), lexical substitution (Quotes 3, 4, 6, 9), reordering/changing a theme–rheme pattern and eliminating an emotional component (Quote 7); transposition with a change in meaning, e.g., when the active voice is unjustifiably replaced with the passive voice (Quote 9).

We notice the omission of words in Quotes 1 and 2. The original statement in Quote 1 meant to imply that the absence of readiness on the part of the collective West is temporary, while the translation elides this meaning. Furthermore, Quote 1 is an authentic TASS<sup>7</sup> translation which has been used in a modified way by NBC News<sup>8</sup>. In the following Quote 2, Kremlin spokesman Dmitry Peskov refers to a brief “romantic”

<sup>7</sup> <https://tass.com>

<sup>8</sup> <https://www.nbcnews.com>

period of hope for peaceful cooperation between the reformed Soviet Union and the world, the collective West here being added as an additional or third side. However, the meaning of the quote has been changed in translation with the elision of “world” to leave only two sides of this relationship, namely the Soviet Union and the collective West.

**Quote 1.** “Поэтому пока со стороны коллективного Запада никакой готовности или открытости к мирным инициативам нет”,—констатировал представитель Кремля. (Lystseva, 2023)

“There is no readiness or openness to peaceful initiatives on the part of the collective West,” Peskov was quoted. (Sackur, 2023)

**Quote 2.** “Горбачев дал импульс [окончанию] холодной войны, и он искренне хотел верить в то, что она закончится и наступит вечный романтический период между новым Советским Союзом и миром, и коллективным Западом.” (Kak v Rossii otreagirovali, 2022)

“Gorbachev gave an impulse for ending the Cold War and he sincerely wanted to believe that it would be over and an eternal romance would start between the renewed Soviet Union and the collective West,” Peskov said. (Isachenkov, 2022)

In the following quotes (3–5) the translators use words with subtle implications (“unstoppable” instead of “relentless”, “bellicose” instead of “aggressive”) instead of the more widely-used terms, possibly to downplay the accusations of aggressiveness on the part of the collective West:

**Quote 3.** “Ход истории неумолим, и попытки этого коллективного Запада навязать свой миропорядок обречены на неудачу”,—подчеркнул он. (Putin zaiavil, chto voynu na Ukraine razviazal kollektivnyi Zapad, 2022)

“The course of history is *unstoppable* and attempts by the collective West to enforce its version of the global order are doomed to fail.” (Ukraine war, 2022)

**Quote 4.** “Мы также видим, что коллективный Запад стремится распространить на Азиатско-Тихоокеанский регион блоковую систему по аналогии с НАТО в Европе. С этой целью формируются агрессивные военно-политические союзы”. (Putin zaiavil, chto Zapad, 2022)

“We also see that the collective West is seeking to extend its bloc system to the Asia-Pacific region *similarly* to NATO in Europe. For this purpose, *bellicose* military-political alliances are being formed, such as AUKUS and the others,” Putin claimed. (Ellyatt, 2022a)

The metaphor “blank wall” (or, literally, “wall of deafness”) in Quote 5 turns into just “wall,” thus losing the implied meaning of a deliberate deafness (or refusal to negotiate) on the part of the collective West:

**Quote 5.** “Но, несмотря на это, господину Гутерришу, к сожалению, не удалось пробить глухую стену коллективного Запада. Условия, которые согласовывались как неотъемлемая интегральная часть сделки, выполнены не были.” (V Kremle nazvali zhestom dobroj voli, 2023)

“But, despite this, unfortunately, Mr. (Antonio) Guterres has failed to break through the collective West’s wall. The conditions that were agreed upon as an integral part of the deal have not been fulfilled.” (Russia says it shows “goodwill,” 2023)

The opposite tendency may also be observed, when the authors of the translation use lexical transformations for the purposes of exaggeration. Instead of “civil confrontation,” they use “civil rebellion,” which has a stronger and more specific meaning: “violent action organized by a group of people who are trying to change the political system in their country” (University of Cambridge, n.d.). While a rebellion in Russia might be desirable for some political elites in the collective West, the original claim merely referred to provoking a civil confrontation.

**Quote 6.** Коллективный Запад пытается расколоть наше общество, спекулируя на боевых потерях, на социально-экономических последствиях санкций, спровоцировать *гражданское противостояние* в России и, используя свою “пятую колонну,” стремится к достижению своей цели. (Stenogramma vystupleniia, 2022)

“The collective west is trying to divide our society,” Vladimir Putin said in a speech late last week. “Speculating on military losses, the socio-economic consequences of sanctions, to provoke a *civil rebellion* in Russia. And is using its fifth column in order to achieve this goal ... the destruction of Russia. (Roth, 2022)

In some cases, changes in theme–rheme patterns are observed (Khlabutina, 2011), which include not only re-arranging the word order, but also involve subtle meanings connoted by the English article system, which is absent in Russian (Beavitt & Popova, 2020). The version (Quote 7) chosen by the translator has a slight difference in meaning, and pointing out to the collective West as new information, and hence emphasising it, is missing here. Besides, they also avoided a more obvious word choice that would manifest itself in inversion such as “and so does the collective West.”

**Quote 7.** “Мы понимаем, что Киев продолжает испытывать проблемы, и проблемы также испытывает и коллективный Запад.” (Peskov zaiavil chto SShA, 2024)

“We understand that Kyiv continues to experience problems, *and the collective West is also experiencing problems.*” (Faulconbridge, 2024)

As well as omitting the pejorative phrase “образовалась эта компашка” [obrazovalas’ eta kompashka], the translation of the next quote (8) includes lexical replacement: instead of “became a participant” the translator used “became involved.” The latter sounds softer and implies less responsibility due to the conceptual shift from being represented as an actor to someone merely drawn in.

**Quote 8.** “Да, это начиналось как специальная военная операция, но, как только там образовалась эта компашка, когда коллективный Запад стал

участником этого на стороне Украины, для нас это уже стало войной. Я в этом убежден”, — сказал представитель Кремля. (Peskov zaiavil, chto Rossiia, 2024)

“It started as a special military operation,” the Kremlin’s spokesperson, Dmitry Peskov, said. “But as soon as ... the collective west *became involved* in this on the side of Ukraine, it became a war for us.” (Sauer, 2024)

A decision to use the English passive voice in Quote 9 to translate the Russian reflexive verb construction “-сь” (meaning “self”) serves to reduce Ukraine’s implied responsibility for allowing itself to be used as a tool in the hands of the collective West. Additionally, it can be noted that “to put more pressure on” is nowhere near as violent as “*додавить*” (phonetically “dodavit”), since it does not express the original idea of destroying Russia.

**Quote 9.** “Украина превратилась в инструмент в руках коллективного Запада, с помощью которого они намерены, как им кажется, *додавить* Россию, сдерживать Россию, оставить ее на задворках развития во всех смыслах.” (Peskov nazval Ukrainu, 2024)

Because Ukraine *has been turned* into an instrument in the hands of the collective west with whose help it intends, so it seems to them, *to put more pressure on* Russia, restrain Russia and abandon it to the fringes of development. (Lowe & Bayer, 2024)

Thus, we see that tendency of misquotation and mistranslation serves ideological purposes, allowing anglophone mass media to impute negative interpretations of Russia’s policy and representatives, as well as to signal virtue and innocence on the part of the West.

### **Tendency 2. Deliberate Omission of Chunks**

Deliberate omission of chunks of text is frequently practised when facts that can weaken the position of the translator’s own country are elided. Unlike the occasional and isolated exclusion of words and phrases that occur as part of the previous tendency, here clauses (Quotes 10–13, 15) and even whole sentences (Quotes 14, 16) that formed an integral part of the meaning of the original are simply removed. Hence, the original mention of “Maidan-style coups” (trans. by Alyona Dymova, Natalya Koptyaeva, & Thomas Beavitt—A. D., N. K., & T. B.), or color revolutions, whose Russian formulation here takes the genitive plural form to connote a series of events of the same basic type (sometimes translated in the singular by Western journalists as “Maidan Revolution” or “Revolution of Dignity”) was omitted in the translation together with the participle clause in the next example:

**Quote 10.** “Очевидны попытки коллективного Запада раскатать ситуацию в стране, *используя техники ‘майданных переворотов.’*” (MID Rossii otreagiroval, 2023)

“The attempts of the collective West to destabilise the situation in the country are obvious,” the foreign ministry spokesperson Maria Zakharova told the state-run news agency RIA Novosti. (Otte & Lowe, 2023)

In Quote 11, the translation oversimplifies the claim about the world order being “based on the priority of international law, the indivisibility of security, respect for the sovereignty and national interests of states,” here ignoring another participle clause. By itself, “just world order” can be interpreted in a variety of ways and without further elaboration remains vague.

**Quote 11.** “... противостоять политике коллективного Запада, препятствующего установлению подлинно многополярного, справедливого миропорядка, основанного на приоритете международного права, неделимости безопасности, уважении суверенитета и национальных интересов государств.” (Putin otsenil podderzhku, 2023)

Putin wrote, according to Russian state Ria news agency: “Strong support from the DPRK for the special military operation in Ukraine, (and) solidarity with Russia on key international issues further emphasise our common interest and determination to oppose the policy of the collective West, which prevents the establishment of a truly multipolar, just world order.” (Chao-Fong et al., 2023)

Another inconvenient fact omitted in Quote 12 is the deliberate stonewalling of the Minsk agreements, as subsequently admitted by Angela Merkel. As a result, the first-time clause is reflected in the translation, whereas the second one is elided.

**Quote 12.** С нами воюет коллективный Запад во главе с ядерной державой—США. Эта война была нам объявлена достаточно давно—после того, как состоялся госпереворот на Украине, оркестрированный США и, по сути дела, поддержанный Евросоюзом, и после того, как Минские договоренности, как теперь уже окончательно выясняется, никто не собирался выполнять, госпожа Меркель вновь это подтвердила. (Mettsel', 2022)

“The collective West, which is headed by a nuclear power—the United States—is at war with us,” Lavrov told Channel One, as reported by the state-run Tass news agency. “This war was declared on us quite a long time ago, after the coup d’etat in Ukraine that was orchestrated by the United States and, in fact, backed by the European Union,” Lavrov said. (Brennan, 2022)

The economic growth of Russia mentioned by Peskov is omitted in the next example (Quote 13). Interestingly enough, while several news agencies such as CNBC and USA Today literally quoted TASS’s translation, they opted to delete “We have started to develop,” thus, focusing primarily on the challenges that Russia is currently experiencing.

**Quote 13.** В экономическом плане мы живем неплохо, мы начали развиваться, у нас, безусловно, есть трудности, есть проблемы, мы не можем не ощущать эти проблемы на себе, учитывая ту недружественную атмосферу, в которой мы находимся, я имею в виду то, что пытаются с

нами делать страны коллективного Запада. Но, несмотря на это, мы все-таки демонстрируем очень хорошие показатели. (Peskov zaiavil, chto rossiiane, 2023)

“In economic terms we are doing quite well,” Peskov said. “We certainly have difficulties. We have problems. We can’t help but feel these problems on ourselves, given the unfriendly atmosphere around us. I mean what the countries of the collective West have been trying to do to us. But despite this, we still demonstrate very good parameters.” (Bacon & Ortiz, 2023)

In Quote 14 we can note a manipulative omission of Russian journalist and TV producer Tina Kandelaki’s words about the benefits the collective West extracted from Russian oligarchs in terms of their spending on luxury goods:

**Quote 14.** Коллективный Запад всегда нас ненавидел. Когда принимал наши деньги, когда обслуживал нас в дорогих ресторанах, когда продавал дома всем этим олигархам без рода и племени. В глубине души он испытывал к нам презрение, ненависть, граничащую с желанием смерти. (Kandelaki, 2024)

“Deep down the collective West always despised us and felt a hatred bordering on a death wish,” prominent TV personality Tina Kandelaki wrote. (Hartog, 2024)

In statement (Quote 15), Maria Zakharova provides a definition of what Russians mean by “the collective West.” While she mentions the capitals of some Western countries (Washington, London, Berlin, and Paris) and other NATO member states, the translator avoids including this list in the translated version. Likewise, they fail to mention the point that all these capitals seemed to be aware of the planned terrorist attack. CNN<sup>9</sup>, The New York Times<sup>10</sup>, and other names of Anglophone mass media were also omitted. Moreover, the repetition of the name “ISIS”<sup>11</sup>, put forward by the collective West as the alleged organiser of the terrorist act and contained in the original statement, disappears in translation.

**Quote 15.** Для того, чтобы отвести подозрения от “коллективного Запада,” от Вашингтона, Лондона, Берлина (который буквально прямым текстом обсуждал, как уже сказала, возможность совершения террористических актов на территории нашей страны), Парижа и других натовских стран, им нужно было срочно найти хоть что-то, хоть какое-то объяснение. Прибегли к ИГИЛ. Так сказать, вынули этот “козырь” из рукава. Буквально спустя несколько часов после теракта англосаксонские мейнстримовые медиа

<sup>9</sup> <https://edition.cnn.com>

<sup>10</sup> <https://www.nytimes.com>

<sup>11</sup> ISIS has been designated a terrorist organisation and is banned from all activities by the United Nations, United States, European Union, Russia, and many others. We condemn all forms of terrorism, particularly this organisation’s activities. ИГИЛ была признана террористической организацией; любая деятельность ИГИЛ запрещена в России, США, Европейском Союзе и многих других странах. Мы осуждаем любые формы терроризма, в том числе деятельность этой организации.

*(“Си-Эн-Эн”, “Нью-Йорк Таймс” и многие другие) начали распространять именно эти версии, главный смысл которых сводился к одному—во всём виновато “Исламское государство”. (Briefing ofitsial'nogo predstavitelia MID Rossii, 2024)*

“In order to ward off suspicions from the collective West, they urgently needed to come up with something, so they resorted to ISIS, pulled an ace out of their sleeve, and literally a few hours after the terrorist attack, the Anglo-Saxon media began disseminating precisely these versions,” she said. (Russia says it is hard to believe, 2024)

While the English translation of Quote 16 mentions terrorist attacks in the Baltic Sea, it fails to convey the original message about the alleged direct beneficiary of the pipeline explosions, namely the United States:

**Quote 16.** *Нелишним было бы задуматься о причинах упрямого нежелания коллективного Запада дать ход транспарентному и объективному международному расследованию под эгидой Совета Безопасности ООН террористических атак в Балтийском море. Равно как и прояснить роль США в подрывах трубопроводов, в том числе как прямого выгодоприобретателя перекрыжки европейского энергорынка. (Embassy of Russia in the USA / Posol'stvo Rossii v SShA, 2023)*

“It would be useful to think about the reasons for the stubborn unwillingness of the collective West to launch a transparent and objective international investigation under the auspices of the U.N. Security Council in the terrorist attacks in the Baltic Sea,” Ledenev was quoted as saying in a post on the embassy’s Telegram messaging channel. (Russia urges “transparent” investigation, 2023)

To sum up the described cases of deliberate omission of chunks, we can conclude that the Anglophone mass media tend to omit inconvenient facts about the collective West (the Maidan coup, the pipeline explosions, benefits from Russian oligarchs) and statements implying a positive view of Russia (its economic growth, the priority given to international law etc.). At the same time, the remainder of the quoted statements tend to stick closely to the original, sometimes even using the official TASS translation.

### ***Tendency 3. Imprecise Indirect Quotation***

In contrast to the tendencies described above, the contexts grouped under this heading show translation manipulations by means of indirect quotation with occasional inclusions of a word or a phrase given in quotation marks. As is seen from the examples below, those words that in any way compliment the translator’s country are quoted in the indirect speech. One reason for this arrangement might be to demonstrate that such compliments are not figments of translators’ imaginations, but are precisely produced by the opposing side. The fact that the rest of the words framing these tiny quotes quite often tamper with the original statement is unlikely to be obvious to the target reader. Among the means employed, we may include generalisation

(Quote 17), concretisation (Quote 23), lexical substitution (Quote 18), changing the meaning (Quotes 19–21), omission of the author’s explanation (Quote 22).

One such case of mistranslation is unjustified generalisation. In Quote 17 instead of “Kiev’s puppet regime” the translator opted to use “Ukraine” in general. However, according to the original statement, the collective West is alleged to support Zelensky’s cabinet rather in the sense that a puppet is “supported” by the puppeteer’s strings, i.e., implying that it is being controlled by a foreign power to advance that power’s ends.

**Quote 17.** “Коллективный Запад ведет против России опосредованную войну, оказывая беспрецедентную поддержку *марионеточному киевскому режиму*.” (Kollektivnyi Zapad vedet protiv Rossii, 2023)

“The collective West is waging a proxy war against Russia,” he said, according to his ministry, pointing to its “unprecedented support” for *Ukraine*. (Russia to build up forces, 2023)

Imprecise quotation can be made in the form of lexical substitution, a means widely used in Tendency 1. For example, in Quote 18, the translator uses “to strengthen” instead of “to preserve.” Furthermore, “to strengthen” is indeed a word borrowed from the original statement—“укреплять” [ukrepliat’],—although there it is applied to an opposing idea that “strengthening global security is not the collective West’s goal”.

**Quote 18.** Что касается “коллективного Запада” во главе с США, то эти страны стремятся затормозить и повернуть данные процессы вспять. Их цель—не *укреплять* всеобщую безопасность и не заниматься совместным развитием, а *сохранить* свою гегемонию в мировых делах и далее реализовывать неокOLONIALную повестку. (Interv’iu Ministra inostrannykh del, 2023)

The goal of the “US-led collective West” is *to strengthen* its global hegemony, Lavrov told the Kompas newspaper. (Russia’s Lavrov, 2023)

Another case of mistranslation involves a change in the meaning, e.g., when predicted energy shortages and price rises in European countries are attributed to Russia. The problems with energy supply are listed along with Ukraine’s loss of state independence. Thus, according to the translation, it is Russia and Ukraine that would suffer from the consequences of the war. This shift in the meaning appears to be aimed at reassuring an average European reader that everything is under control:

**Quote 19.** “Их грехи. (В чём Россия не виновата) ... 2. В том, что обычные европейцы будут люто мёрзнуть в своих домах этой зимой. 3. В том, что в Европе и США самая высокая продуктовая инфляция за последние десятилетия. 9. В том, что после переворота 2014 года Украина потеряла государственную независимость и перешла под прямое управление коллективного Запада, а также поверила в то, что НАТО будет обеспечивать её безопасность”. (Medvedev, 2022)

“After the 2014 coup, Ukraine lost its state independence and fell under direct control of the collective West as well as began to believe that NATO would guarantee its security,” he noted as he blamed the West for the fallout from the Ukrainian war, *such as energy shortages and high food prices*. (Ellyatt, 2022b)

An illustrative example of imprecise indirect quoting is given in Quote 20. In the original text, Peskov asserts that the *special military operation* was initially aimed at Ukraine, but then it subsequently turned into a form of *war* against the collective West. However, in the English translation with extended comments, while it turns out that the “special military operation” *has indeed become* a “war against the collective West,” all the intermediate explanations are omitted.

**Quote 20.** “Специальная военная операция начиналась против Украины. Со временем она приняла форму войны против коллективного Запада”. (Peskov zaiavil, chto spetsoperatsiia, 2024)

President Vladimir Putin’s spokesman informed Russians this week that the “special military operation” that Putin launched in Ukraine in February 2022 was set to go on much longer because *it is now* “a war against the collective West.” (Nemtsova, 2024)

In some indirect quotes the translator can replace the second conditional used for a hypothetical situation, e.g., If “we imagine that the offensive of the Ukrobanderites with the support of NATO was successful and they seized part of our land, then we would have to, by virtue of the rules of the decree of the President of Russia dated June 2, 2020, resort to the use of nuclear weapons” (Medvedev, 2023; Trans. by A. D., N. K., & T. B.) with the first conditional used for real situations (threatens to unleash nuclear war if Russia is defeated). This leads to exaggeration and misrepresentation, especially since the conditions and the purposes for this hypothetical action are ignored in the translation, as can be seen in Quote 21. Moreover, the words about preventing a global conflict are intentionally left out to make the Russian armed forces look aggressive and dangerous.

**Quote 21.** Наши Вооружённые силы, отражая контрнаступление коллективного врага, защищают граждан России и нашу землю. Это очевидно всем приличным людям. Но помимо этого они предотвращают мировой конфликт. Ведь если представить себе, что наступление укробандеровцев при поддержке НАТО удалось и они отторгли часть нашей земли, то нам пришлось бы в силу правил указа Президента России от 02.06.2020 пойти на использование ядерного оружия. (Medvedev, 2023)

Earlier this year, he also *threatened to unleash* nuclear war on *the collective West* if Russia is *defeated* in Ukraine. (Cleave, 2023)

Indirect quotation implies paraphrasing and summarising, but in many cases of political mistranslation we observe exaggeration, one-sided interpretation, or omission of the author’s explanation. For instance, in Quote 22 the translator summarises

Putin's explanation in just a few words, whereas the arguments the Russian president advances provide necessary context for the political decision they defend and should therefore be taken into consideration. Noteworthy, the original statement does not contain the term the "collective West," instead naming its leaders Washington, London, and Brussels, which makes its insertion a peculiar word choice. Here, we again observe a change in meaning since in the original statement it is Russia that is said to be threatened—"при угрозе" [pri ugroze],—whereas in this particular mistranslation Russia is blamed for threatening someone else.

**Quote 22.** "Тем, кто позволяет себе такие заявления в отношении России, хочу напомнить, наша страна также располагает различными средствами поражения, а по отдельным компонентам и более современными, чем у стран НАТО и при угрозе территориальной целостности нашей страны, для защиты России и нашего народа. Мы, безусловно, используем все имеющиеся в нашем распоряжении средства. Это не блеф",—заявил Путин. (Obrashchenie Prezidenta, 2022)

Russia is fighting not only Ukraine but *the entire "collective West" that wants to destroy it*, Putin said in a speech explaining the decision on national television. He again *threatened to use all available means including nuclear weapons* to defend territory. "This is not a bluff," he said. (Putin ups the ante, 2022)

Another case of manipulative summarising can be seen in Quote 23. Concretisation and generalisation can be applied as means of paraphrasing, but in this context inappropriate concretisation changes the meaning of the statement:

**Quote 23.** "Любая провокация, любой внутренний конфликт в военных и политических кругах, в информационном поле и гражданском обществе—подарок коллективному Западу",—отмечается в сообщении. (V Belorussii zaivili, 2023)

Belarus, a close ally of Russia throughout the invasion of Ukraine, called *the internal dispute* "a gift to the collective West." (Aitken, 2023)

#### **Tendency 4. Tampering With the Cornerstones of Direct Quotation**

As with Tendency 1, this tendency represents contexts using direct quotation. However, these more fundamental changes involve more blatantly manipulative intrusions in the direct quotations. When contrasted with the original, such mistranslations are straightforwardly obvious, since they turn the entire argument upside down under the guise of reporting someone's direct speech. This tendency includes the shift from the Passive Voice to Active (Quotes 24, 29), lexical substitution (Quotes 25, 26), omission (Quotes 27, 28).

When speaking about hypothetical threats and possible outcomes, Putin used the phrase "вынуждена будет реагировать" [vynuzhdena budet reagirovat'] (Quote 24), which means "will be forced to react." This meaning, which could also have been translated as "will have to react" or "it will be necessary to react," was completely changed.

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The purpose of this mistranslation was to shift the responsibility for using nuclear weapons onto the Russian government, but ignoring the context and background.

**Quote 24.** “Хотел бы в этой связи отметить, что если все это будет происходить, *то соответствующим образом Россия вынуждена будет реагировать*, имея в виду, что коллективный Запад начинает применять уже оружие с ядерным компонентом”,—сказал Путин. (Abramov, 2023)

“If that happens, *Russia will respond* accordingly, given that the collective West is starting to use weapons with a nuclear component,” he said, without elaborating. (Ritter, 2023)

In the following quote (25) by the Belarusian President Lukashenko, the mention of allies and other integration unions was omitted, “counteraction” or “pushback” was replaced with “front,” and the post-Soviet space is mentioned in connection with pressure rather than unified resistance. All that creates a more heightened effect of militarisation of the countries supporting Russia.

**Quote 25.** “И не нужно думать, что это кого-то обойдет стороной. Сейчас абсолютно очевидно, что, не встретив *единого противодействия* со стороны союзников по организации и других интеграционных объединений на постсоветском пространстве, коллективный Запад будет наращивать свой прессинг”. (Vystuplenie Prezidenta Belarusi, 2022)

“*Without a united front*, the collective West will build up pressure on the post-Soviet space,” Mr. Lukashenko said in televised opening remarks. (Putin warns Russia will respond, 2022)

As a lexical transformation to soften the statement, the word “вина” [vina] (blame) regarding the collective West was translated as “responsibility” in Quote 26. The initially used lexeme implies doing something wrong, whereas “responsibility” is more strongly associated with someone correctly performing their duties.

**Quote 26.** Поэтому *вину* за продолжающееся кровопролитие в Украине в полной мере должен нести коллективный Запад. (Makei s vysokoi tribuny OON, 2022)

“Therefore,” he claimed, “it is the collective West that should fully bear the *responsibility* for the ongoing bloodshed in Ukraine.” (Sarkar, 2022)

The chunk “*standing together against the collective West*” was omitted in Quote 27 despite being introduced as a direct quote. The suggestion of Russia being supported by other countries seems redundant to the translator.

**Quote 27.** “Сегодня мы вместе противостояем коллективному Западу, который ведет против наших стран, по сути, необъявленную войну”,— указал министр. (Shoigu zaiavil o vedenii, 2023)

“The collective West is essentially waging an undeclared war against our countries,” Mr Shoigu claimed. (Stevenson, 2023)

The point about the United States subjugating the entire collective West was omitted in Quote 28. Instead of attempting to translate the metaphorical expression “*поставить под ружье*” [postavit’ pod ruzh’e], meaning “put under arms,” the translator simply opts to repeat “mobilized.”

**Quote 28.** “Сегодня США подчинили себе практически весь коллективный Запад, мобилизовав его на превращение Украины в инструмент войны с Россией, так же как в свое время Гитлер поставил под ружье большинство стран Европы для нападения на Советский Союз.” (Lavrov: SShA deistvovali, 2022)

“The U.S. has *mobilized* practically all of the collective West to turn Ukraine into an instrument of war against Russia, just as Hitler *mobilized* military resources of most European nations to attack the Soviet Union,” Lavrov said. (Live Updates: Russia–Ukraine War, 2022)

One of the most egregious distortions appearing in this group can be observed in Quote 29. Here, instead of the collective West appearing as the actor of the verb “противодействовать” [protivodeistvovat’], which means “act against” or “antagonise”, the translation reverses the verb structure to portray Russia and its armed forces in this role:

**Quote 29.** “Нашей стране и ее вооруженным силам сегодня противодействует практически весь коллективный Запад”,—заявил Герасимов. (Gerasimov zaivil, 2023)

“*Our country and its armed forces are today acting against* the entire collective West,” Gerasimov said. (Kelly, 2023)

As formulated by Anderson and Itule (1984), in journalistic contexts, while “misquoting is a cardinal sin,” this does not imply that quotes “cannot be altered slightly to clean up grammar or to take out profanities; it means that quote marks around a sentence are somewhat sacred. They mean the words are exactly—or nearly exactly—what the person said” (Anderson & Itule, 1984, p. 65).

### ***Tendency 5. Defacing the Source of Quoting***

In order to form a biased judgement in the reader when reading a quotation, Anglophone mass media use derogatory and ironic comments, evaluative language, labels, and negative epithets: “In one *bizarre* remark during his speech, Putin claimed...”; “the *tyrant droned* on for nearly an hour...”; “*The more than 11,000-word document* approved by Putin”; “She *went into great lengths*” [about Maria Zakharova]; “*pro-Kremlin newspaper*.” The reader’s opinion is also shaped by the characterisation of information sources as pro-government (*state-run, pro-Kremlin*), which imply a bias and one-sidedness on the part of the quoted source.

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**Quote 30.** “The attempts of the collective West to destabilise the situation in the country are obvious,” the foreign ministry spokesperson Maria Zakharova told the *state-run* news agency RIA Novosti. (Otte & Lowe, 2023)

**Quote 31.** The crowds looked glum and appeared to clap on cue as the *tyrant droned* on for nearly an hour before the separatist leaders signed the decrees, joined hands and chanted “Russia!” In one *bizarre* remark during his speech, Putin claimed the “collective West is afraid of our philosophy and that’s why they try to assassinate our philosophers”. (Braddick, 2022)

**Quote 32.** “We are in a state of war. Yes, it started as a special military operation, but as soon as this bunch was formed there, when the collective West became a participant on Ukraine’s side, for us it already became a war,” Kremlin spokesman Dmitry Peskov said in an interview *to a pro-Kremlin newspaper* published on Friday. (Averre, 2024)

**Quote 33.** *The more than 11,000-word document* approved by Putin on Friday describes Washington as “main inspirer, organizer and executor of the aggressive anti-Russian policy of the collective West.” (McFall, 2023)

An additional means to discredit Russia in translation is victimisation: thus, in some contexts, translated material is used to portray Russia as a victim, a weak side that complains. In the world of power in which states try to project strength and reassurance, this image is considered to be shameful. However, the original translated statements typically do not imply this meaning. In order to achieve this effect, the lexeme “victim” is widely used in the description of the quote source in the examples below together with a range of actions pertaining to a victim (e.g., *a complaint, to lament*).

**Quote 34.** *In Putin’s world*, the West is the aggressor *and Russia the victim*: “I want to underscore again that their insatiability and determination to preserve their unfettered dominance are the real causes of the hybrid war that the collective West is waging against Russia.” (Gioe, 2023)

**Quote 35.** In a wide-ranging interview with Russia’s Channel One, broadcast on Wednesday, Lavrov claimed *Russia is a victim* of long-term Western aggression. (Brennan, 2022)

**Quote 36.** Lavrov’s trips are partly a Russian effort to foster support for *Moscow’s complaint* that “the collective west” is trying to break up Russia. (Lowe et al., 2023)

**Quote 37.** *Former Putin adviser Sergei Glazyev lamented in public* that Russia does not have a clear end objective, a sound ideology or the resources to win the war against the collective West. (McFaul, 2023)

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Research into the linguistic construction of the “victim” image has shown, for instance, that such a label is perceived more negatively than the “survivor” image (Papendick & Bohner, 2017, p. 1). In politics, however, this stance is believed, when artificially constructed by mass media, to discredit the image of the “hero–victim” and turn it into the image of the “enemy–victim” (Kozyrev, 2009, pp. 20–21).

### Discussion of the Results of Textual Analysis

In order to study intercultural and ideological differences revealed in translation, we sampled texts featuring the term the “collective West.” Since this term is ideologically charged and its usage limited by political contexts, we expected to reveal some discrepancies in the translations. However, along with more subtle changes, the overwhelming evidence of wholesale tampering with direct quotation, omission of significant chunks, and defacing of quotation sources is hard to explain other than in terms of intentional manipulation and distortion. While it may be tempting to blame translators themselves for what would generally be considered in most contexts as malpractice, it is likely that many of the observed distortions in the translated texts, which reveal cultural and ideological differences, personal disagreements with the statements, as well as bias and manipulative intentions, are the result of subsequent editorial distortions applied to texts that had already been translated into English. In any case, unless the translation source is acknowledged, the inherent opaqueness of such textual manipulation processes prevents a precise attribution of blame. Nevertheless, the identified misquotation and mistranslation tendencies clearly serve ideological purposes in terms of their use in Anglophone mass media to invite negative assessments of Russia’s policies and political leaders, along with corresponding positive (or less negative) attitudes towards Western policies and leadership.

It would be hard to construct a rigorous linguistic argument supporting the contention that the English language is inherently susceptible to such manipulations. In principle, similar accusations could probably be made against translators and editors working in other globally important languages, such as Russian, Arabic, Spanish, or Chinese. However, as revealed by the body of research, English does seem to represent a particular case in point. This may be due to its present global status and role—not least in terms of upholding the interests of those euphemised in the term the “collective West.”

One of the points frequently raised by Russian leaders in the analyzed material concerns an intentional “wall of deafness”, i.e., a refusal to listen on the part of the “collective West.” Unfortunately, until such a wall of deafness is surmounted, it appears likely that a basis for negotiation will also be lacking, thus prolonging the present conflict. Nevertheless, all wars fought so far have ended in negotiations; moreover, despite the circumstances, these negotiations were necessarily conducted in language that permitted no such distortions as have been identified in the present work.

## Conclusion

Our analysis of translation distortions and linguistic manipulations on the example of the “collective West” confirms tendencies previously identified in the academic literature on translation distortion and linguistic manipulation. While English tends to play a central role in such investigations, this seems likely to be a result of the present status of the language in international discourse, which, in turn, is connected with the identity of the “collective West.” Future studies may consider the extent to which translation distortion and linguistic manipulation occurs in languages other than English and whether such a comparison could be carried out on a rigorous basis.

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ARTICLE

## On the Way to a Secularized Theology: Why Today's Disapproval of an Atemporal God Is Gaining Momentum?

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### ABSTRACT

The ongoing secularization of religion, which is associated with the development of a “post-secular society,” also manifests itself in a major controversy in analytic theology, which not so long ago remained a stronghold of religious traditionalism. The belief in the inseparability of essential atemporality of the Divine from creationism, which lies at the core of Christianity and other monotheistic religions, is in the process of being revised by a growing majority of Christian theologians. The conception of a timeless God that is currently under attack by temporalist theologians is criticized as an outdated commitment on the part of traditional theology to the Neoplatonic doctrine of a “static” Absolute. However, the desire for a “static” Absolute is not limited to Greek thought but has intercultural foundations, and in reality, no contradiction between Divine activity and atemporality can be derived from the Greek, Arabic, and Indian texts dealing with it. The increasing popularity of theological temporalism is explained in terms of a scientific attachment to evolutionism and associated urge to “democratize” a transcendent God. Some parallels from Continental “post-secular” theology, including the anthropocentric turn that replaces a theocentric vision of the world with a humanistic orientation, are also discussed.

### KEYWORDS

analytic theology, timelessness, changelessness, temporalism, creationism, Christianity, Neoplatonism, Islam, Hinduism, post-secular society

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## Introduction

It was not until the mid-20<sup>th</sup> century with the provocative challenge from Charles Hartshorne (1948, 1984) who insisted on “Divine relativity”<sup>1</sup> that the timelessness of God became a general topic of discussion in Western theology. St. Augustine had insisted that time was created with the world<sup>2</sup> and therefore cannot not be an attribute of the Creator. Due to its perfect fit with the Christian worldview, this view was endorsed by the authorities of Boethius, Anselm, Thomas Aquinas, and Francisco Suarez such as to permit only a very narrow space in Christian theology for the expression of alternative views<sup>3</sup>. It is true that there have been attempts to question the meaning of the terms Augustine used in his definition. For example, John Locke (1825) took eternity to be nothing more than an infinity of temporal duration (p. 120). Thomas Hobbes, Isaac Newton, Samuel Clarke, and some other eighteenth century writers questioned the intelligibility of the Boethian formula of Divine simultaneity with all times (i.e., living in “eternal now”). Nevertheless, there continued to be strong defenders of Divine eternity as atemporality, e.g., Benedict Spinoza, Gottfried Leibnitz, Ann Convey, and others. Moreover, until recently, these disparities did not lead to any major challenges within traditional theism<sup>4</sup>. What has now become a hot issue in analytical metaphysics apparently started with the controversial paper by Eleonore Stump and Norman Kretzmann (1981), in which Boethius’ classical thesis that “Divine eternity is the perfect possession of the whole fullness of unending life” and is therefore timeless (Boethius, 524/2008, V.6.9–11) was backed by contemporary physics through the theory of special relativity. While their appeal to science did not prove altogether successful<sup>5</sup>, it spurred on the “temporalists” to produce new arguments, which in turn led to new counter-arguments from the traditionalists<sup>6</sup>.

<sup>1</sup> Hartshorne regarded God only as the head of the society of all realities consisting of experiences which do not exist outside them. Thus, while God constitutes the privileged part of them, he, on the other hand, represents its inclusive “whole,” able to access all other experiences—in short, as “supreme yet indebted to all” (Hartshorne, 1948, pp. 25–59, esp. 47). What developed from these seeds was endorsed in his popular later work wherein he collected “all cardinal mistakes” of traditional theism, i.e., the ideas of God as absolutely perfect and therefore unchangeable being, omnipotent, omniscient and unlimited good along with the ideas of the personal immortality of human beings and transcendent Revelation. See Hartshorne (1984).

<sup>2</sup> While the first mainstream theologian to have mentioned this was Philo of Alexandria in *De Opificio Mundi* (Philo, ca. 30–40/1981, VII.26), it was not as influential as Augustine’s doctrine.

<sup>3</sup> While Katherine Rogers in her masterpiece *Perfect Being Theology* mentions that Aquinas’ opponents (almost in every respect) Duns Scotus and William Ockham questioned this view, which however continued to be absolutely predominant, she does not provide evidence for this claim (Rogers, 2000, p. 54).

<sup>4</sup> A good panorama of views on the subject in early Modernity is presented in Melamed (2016, pp. 129–167).

<sup>5</sup> The main criticisms of Stump and Kretzmann consisted in demonstrating that their views contradicted the theory of general relativity, which assumed the idea of absolute time, and the authors revised their former view ten years later in Stump & Kretzmann (1991).

<sup>6</sup> One of the leading temporalists William Hasker responded to them in his well-known book which could be regarded the manifesto of open theism (Hasker, 1989, pp. 162–170).

## Two “Big Camps”

The controversy has already generated numerous publications<sup>7</sup>. The main arguments of both “camps,” which are by now well-known, can be summarised in the most general terms as follows.

The champions of the traditional (i.e., Augustinian/Boethian) teaching, wherein God is regarded not as everlasting but timeless, generally refer to: (a) the Anselmian conception of God as the Most Perfect Being (*quo melius nihil cogitari potest*) (Anselm, ca. 1077/1979, *Proslogium*, 9, 1, 108; 11–13; 14, 1, 111; 18, 1, 114, *Cur Deus Homo*, I, 13, II.71,15) whose perfectness cannot be regarded as “perfect” if we acknowledge in him any degree of temporality which is changeability; (b) a normal understanding of Divine foreknowledge; (c) similarities between Divine atemporality and aspatiality emphasized by Katherine Rogers (2000) in the sense that if the latter is indubitable the same should be true also with the former; (d) the doctrine of the Trinity wherein distinctions between “former” and “later” are not applicable to Divine nature, as stressed by Paul Helm (2010, Ch. 15) because the Father cannot be older than the Son who is coeternal with him. There is also an additional argument accepted partially even by the opponents of temporalism, i.e., (e) Brian Leftow’s idea that the coherence of the concept of temporality as such (not only the temporality of God but also of contingent things) can in the final analysis be challenged (Leftow, 1991, pp. 217–245).

In contrast, those who insist that God is eternal in the sense of temporally everlasting appeal to arguments from: (a) the incompatibility between Divine timelessness and His knowledge of temporal facts; (b) the incompatibility between God’s atemporality and His interactions with temporal beings, including answering some of their prayers; (c) the idea of Divine personality (in the sense that any person has to have a biography and therefore a temporality). Sometimes the view is additionally expressed that (d) an impersonal and atemporal God cannot provide human beings with a genuinely free will. Simultaneously and by the same thinkers, e.g., William Hasker (1989), it is asserted that (e) an atemporal God cannot provide Providence. Relatively early in the controversy, it was even asserted by John Lucas that (f) the doctrine of timeless eternity has a more practical application inasmuch as “only if God is distanced from the world of space and time can He be acquitted of responsibility for the terrible things that happen within it,” thus resolving issues concerning “an unfair theodicy” (Lucas, 1989, pp. 209–210). Both parties are, nevertheless, unanimous in the opinion that no evidence for the very nature of Divine eternity is available directly from the Bible (in spite of numerous statements therein that God has neither beginning nor end).

There are also some analytic philosophers who, in an attempt to wear two hats simultaneously, suggest a compromise solution. While Alan Padgett (1992) assumes that God is subject to change and is therefore also temporal, this does not mean that His timelessness should be totally abandoned but can be redefined to mean that God is relatively timeless, in the sense that He is not measured by time, nor affected by

<sup>7</sup> Natalja Deng who dealt with this issue in her fundamental contribution to The Stanford Encyclopedia of Philosophy managed to discover three levels of both positions, that is strong, weak, and moderate (Deng, 2018).

the negative aspects of temporal passage. Divine time is ontological time, not our measured time in seconds, days, centuries, etc. (Padgett, 1992, pp. 19, 122, 130–131, 146). According to William Lane Craig’s view, God is timeless when He has not created the world, and temporal when He has created it (Craig, 2009). While endorsing Padgett’s distinction between “measured time,” or our time, and “ontological time,” or God’s time, Craig (2009) identifies the latter with Newton’s absolute time. He also introduces “cosmic time,” i.e., a third kind of time. Nevertheless, this apparent solution encounters a justified objection as to what these “new times” properly refer to.

### Shift of Balance

On the whole, voices opposing Divine timelessness are becoming louder than those that support the traditional view. Ryan Mullins, one of the most active participants in this polemic, in his book simply entitled *The End of Timeless God* (2016) expresses many of the typical temporalist arguments listed above but also sharpening some of them, e.g., insisting on the impossibility for an atemporal God to have a presentistic awareness of the flow of time, be free to create the world, become incarnate or allow finite beings to have free will. Based on this, he concludes

that the Christian God cannot be timeless. I also argue and conclude that there is no such thing as a third way between temporality and atemporality. My argument leaves us with the conclusion that God is temporal. My suggestion is that theologians and philosophers should abandon the timeless research program because it is unworkable and devastating to Christian theology. Instead, they should devote their attention to developing models of divine temporality and the implications it has for the rest of Christian theology. (Mullins, 2016, pp. 208–209)

Such a theological claim could not have been advanced even thirty years ago, not to mention in earlier times<sup>8</sup>.

We can happily agree with Mullins’ conclusion that there is no such thing as a third way between temporality and atemporality (if taken in the absolute sense). And he is still more justified in arguing that implications of Divine temporalism should be decisive also “for the rest of Christian theology.” Indeed, the achievement of his desire could have put an end to almost two millennia of Christian theism founded on creationism—and, correspondingly, the acknowledgement of the profound ontological distance between the everchanging world and its unchangeable Author.

While it is also true that not all temporalists are panentheists of Hartshorne’s type (see above), all panentheists are certainly temporalists. So, the radical “ontological temporalists” inviting us to embrace an evolving God, even if they like to refer to their views in terms of theism, invite us in reality to adopt some other religious world outlook. In this way, Peter Forrest, a philosophical heir of Hartshorne and the author of *God*

<sup>8</sup> One can only mention that forty years ago Nicolas Wolterstorff wrote, “Only a small minority have contended that God is everlasting, existing within time. In what follows I shall take up the cudgels for that minority” (Wolterstorff, 1982, p. 181).

*Without the Supernatural* (1996)<sup>9</sup> and *Developmental Theism* (2007) firmly holds that God is transforming himself from being a pure, unbound and totally homogenous Will into the Trinitarian God able to respond with love to human love<sup>10</sup>, so that “a change in which [new] universes are still possible implies a change in the divine character” (Forrest, 2007, p. 112). It is not surprising in this regard that he offered the outright conception of the universe as God’s body and called it “anthropomorphic theism.” Close to him is John Bishop, also a spiritual heir to Hartshorne, whose “humble god” is not the Creator, but only an interpreter of the world (he calls it “an adequate alternative” to traditional theism), “not by standing outside the Universe as its efficient cause, but by being its teleological culmination within it” (Bishop, 2009, p. 429).

Therefore, today’s controversy on the topic seems to be one of the most important among all others as dealing with the core of Christian religious belief. Such relevance is also connected with the willingness of both parties to “go out to fight” (and fight vigorously) not from some neutral philosophical point of departure, but for a better interpretation of Christian theism.

### Imaginary Argument From the Neoplatonic “Stasis”

While pondering on why still many atemporalist theists wish for their God to be immutable (and in this way rightly acknowledge that to be in time and in change is essentially the same thing), Richard Swinburne (1993) is sure that this came from Neoplatonic influence on Christian theology, for “things which change are inferior to things which do not change” (p. 222) for a Platonist. This view is mistaken for “the perfection of a perfect being might consist not in his being in a certain static condition, but in his being in a certain process of change. Only Neoplatonic dogma would lead us to suppose otherwise” (Schärftl et al., 2016, p. 222). And this Neoplatonic intervention (quite strange to the primordial Christianity) took place not earlier than in the 3<sup>rd</sup>–4<sup>th</sup> centuries.

While the contraposition of “Athens” to “Jerusalem” was formulated no later than by Tertullian (ca. 155–220), what is of importance now is its modern relevance within the controversy under discussion. William Hasker (2009), the acknowledged leader of so-called open theism, goes still further, referring to Parmenides’ insistence that true reality should be immutable, and his successor, Plato, from whom Augustine borrowed his doctrine of Divine atemporality, which was alien to the original Christian conception (Hasker, 2009, pp. 82–83). Garrett J. DeWeese, a temporalist of Padgett’s and Craig’s “breed,” who devotes two chapters of his book *God and the Nature of Time* to argue that God exists in time but not in our physical time, and that the whole tradition of atemporalism from Augustine to Aquinas begins with Neoplatonism (DeWeese, 2004, Ch. 5–6). Thus, it would be scarcely an exaggeration to claim that consistent opponents of atemporalism refer to the neo-Platonic origin of this doctrine, which is specific to the

<sup>9</sup> One cannot keep oneself here from parallels with the famous deistic opus *Christianity Not Mysterious* (1696) by John Toland.

<sup>10</sup> See also Schärftl et al. (2016, p. 22).

Hellenic metaphysical mind and essentially incompatible with the Christian God as portrayed in the Bible.

However, is it true that Neoplatonic metaphysics is so static—or, in other words, so simple-minded—as the temporalists make it out to be? It would seem that this verdict is a product of an evident misunderstanding. While for Plotinus (ca. 270/1988), movement cannot be ascribed to the One, as is also true of thinking and even the good (VI.9.9.6, cf. IX.6.9.6), this is not because the nature of the One is limited by lacking these qualities, but because it “precedes” them, being their transcendent source. It may be fairly wondered how a “static state” can be ascribed to such a super-essence which overwhelms itself and outpours beyond itself in the worlds proceeding from its first emanations<sup>11</sup>. However, it is not only Plotinus, but also the author of such indisputable authority for both Eastern and Western Christianity as Pseudo-Dionysius the Areopagite, whose works assert that “the Sovereign God,” “the Ancient of days” is such a Being that “is anterior to Days and anterior to Eternity and Time.” And the titles “Time,” “Day,” “Season,” and “Eternity” must be equally applied to Him in a Divine sense, to mean One who is utterly incapable of all change and movement and, in His eternal motion, remains at rest” (Dionysius the Areopagite, 1920, p. 170). That means that Divine dynamics is static and statics is dynamic and both of them are present and transcended in God who exists beyond time and change.

In addition, it is incorrect to assert that the doctrine of the essential changelessness of the Divine entered Christianity only with Neoplatonism. For example, Theophilus of Antioch (who died between 183 and 185) states that it is one of God’s attributes (ca. 180–185/1970, I.4). Tertullian who died in 220 long before Plotinus (who died in 270) began to utter his sayings, also asserted that God is unchangeable, being eternal (ca. 213/1948, XXVII), and none of them scrutinised Aristotelean metaphysics where immutability is ascribed to the highest level of being while mutability to lower strata (Aristotle, 350 B. C. E./1966, VI.I., 1026a, 22–23).

It is not only Christian theologians who regarded a changeless God as timeless. To give only a few examples, Abu al-Mu’in al-Nasafi (1046–1115), one of the most authoritative theologians in the Maturidi school of Sunni Islam, indicated in *Bahr al-Kalam fi ‘Ilm al-Tawhid* [Ocean of Discussions on the Science of Monotheism] that God’s attributes being perfect and blameless include omnipotence and omniscience and his existence before space and time (Ch. 1–2). Still more expressive on this topic was Abū Bakr Muḥammad ibn al-Ṭayyib al-Bāqillānī (950–1013), the author of *Al-Insaf fima Yajib l’tiqaduh walā Yajūz al-Jahl bih* [Equity in What Must Be Believed In, and May Not Be Ignorant About] who defended and strengthened the Ash’ari school in Sunni Islam; using almost the same words as Augustine, he stressed that the question as to “when God had been” (before creation) is irrelevant inasmuch as He “preceded” time itself and created space and time while existing “before them” (Al-Bāqillānī, 1957, The Introduction, Section 22, Ch. 8). However, there is no information that these Islamic philosophers were great connoisseurs of Plotinus or Proclus. It is true that

<sup>11</sup> Cf. “and its nature is of such a kind that it is the source of the best and the power which generates the real beings, abiding in itself and not being diminished and not being one of the things which it brought into being” (6.9.5). This translation by A.H. Armstrong is referred to in Plotinus (ca. 270/1988, p. 321).

scholars discuss the extent of the influence of Neoplatonic emanationism on some Islamic Aristotelians (Al-Farabi and Ibn Sīnā) and the controversy about the correlation between universal and individual soul<sup>12</sup>, but Divine immutability and timelessness were already in the Kalamīc doctrines professed later even by avowed opponents of the Islamic heirs of Antique philosophy. Al-Ghazālī, the best known among them, opposed Ibn Sīnā's very reasonable idea that an atemporal God should not have knowledge of all events taking place in the temporal world of everlasting vicissitudes but could be selective in the choice of objects of His knowledge, but his atemporality has not been disputed as an axiom. Neither did Ibn-Rushd in his famous *The Incoherence of the Incoherence* [Tahāfut al-Tahāfut] representing a direct response to al-Ghazālī's criticism of Ibn Sīnā, in which the conception of Divine perfect knowledge was discussed, in any way question God's atemporality<sup>13</sup>. Now, not only Neoplatonic but also Aristotelean and still more Sufi mystical layers are being uncovered in the writings of Ibn-Rushd's junior contemporary Muhyī al-Dīn ibn al-'Arabī (1165–1240) who, on the basis of mystical visions, distinguished between divine Names as they are manifested in the world, being temporary, and the same Names in themselves referring to a Divine essence that is atemporal. It would hard to find even a hint of "stasis" in such a worldview<sup>14</sup>.

Still more distant from Neoplatonism is classical Indian philosophy, where, while there is no full-scale theism, we may find numerous approaches to it<sup>15</sup>. And here we also meet many-sided features of atemporal conceptions of God in different versions of *īśvaravāda* ("the teaching of God" or "the doctrine that God exists"), and direct correlations between Divine omniscience and timelessness were pointed regularly. In the *Yoga Sūtras* and all commentaries thereon (from that of Vyāsa, i.e., 5<sup>th</sup>–6<sup>th</sup> centuries, up to that of Vijñānabhikṣu, which dates from 16<sup>th</sup> century), *īśvara* is characterised as the omniscient being and the teacher of even all preceding teachers, since he is not limited by divisions of time; the inapplicability of these divisions is directly identified here as being perfected (*siddha*)<sup>16</sup> (I.26). In *The Cluster of Flowers of the Nyāya Tree (Nyāyamañjarī)* by Jayanta Bhaṭṭa (9<sup>th</sup> century),

<sup>12</sup> See, e.g., a relatively contemporary collection of papers (Morewedge, 1992).

<sup>13</sup> See, among latest contributions, Taniş (2021).

<sup>14</sup> Particular attention is paid to this difference, in the context of the Western apologists' criticism of temporalism, especially those who insist on incompatibility between Divine atemporality and omniscience including the presentist knowledge (in the sense that God can know not only that an event takes place on, e.g., 9<sup>th</sup> July, 2024, and cannot know that it takes place "today" or "now" inasmuch as involvement in time is needful for such a knowledge but can have also these knowledges) through ibn al-'Arabī's theology in a detailed investigation (Lala, 2024). One cannot avoid an impression that in such a case an obvious similarity between the approach under discussion and Orthodox difference between Divine essence and energies mediating God's interrelations with the created world is on hand. This difference was promulgated already by Basil the Great (330–379) and worked out by St. Gregory Palamas (1296–1359).

<sup>15</sup> The main reason for this verdict is that Divinity (*īśvara*) with Indian philosophical theists is bereft of omnipotence inasmuch as it cannot do anything (the creation of the world included) which could infringe on the law of karma and samsara acting as beginningless and endless by its own mechanism (it can only slightly correct the latter's work), which explains why creationism is not invoked here. This division of Indian philosophical theism into strong, medial, and weak versions along with ranging Indian attempts to offer models of theodicy was presented in the work of Shokhin (2010).

<sup>16</sup> See, e.g., Patañjali (1963, p. 29).

wherein the strong version of Indian philosophical theism was developed, God's knowledge is characterised in its most creative form (almost as with Boethius) as comprehending all things (past, future, subtle, and concealed) in an "undivided" fashion as beyond the very opposition of what can be progressive and simultaneous (and these two options exhaust temporality)<sup>17</sup>. Śāṅkara (7<sup>th</sup>–8<sup>th</sup> centuries), the founder of Advaita-Vedanta and the author of the *Thousand Instructions on the Truth (Upadeśhāsāhasrī)*, avowed that the Absolute (*īśvara* being its epithet) should be regarded as having nothing material, impure, and changeable (*vikāra*) and the witness of all intellects in the world (II.7.3). It is not by chance that this characteristic of *īśvara* as being different from an individual self (*jīva*) and identified as the eternal seer is accompanied in his texts by the attribute *kūṭastha* (literally, "one staying on the top of a mountain"<sup>18</sup>. Here we have an exact parity not only with Boethius' idea but also his idiom<sup>19</sup>, i.e., the expression of the attribute of a being not subject to any change, and this unchangeableness was regarded as perfectness. Contrary to Nicolas Wolterstorff, one of the most authoritative temporalists, Indian theists did not detect even the least difficulty in reconciling timelessness and omniscience<sup>20</sup>. However, Indian thought also provides a very impressive argument by contradiction. It was the ancient antitheist school of the Sāṅkhya philosophy, whose active primordial matter called Prakṛti just considered as everlasting changeable, was regarded as the full-scale alternative to God as the cause of the world.

All the aforesaid shows quite distinctly that by no means only Neoplatonic but also intercultural religious metaphysics (in some cases involving coincidences even with the idiom of the pillar stones of Christian theology) thinkers were sure that God as *id quo nihil majus cogitari nequit* (and from this Anselmian definition no religious mind can dissent) should be conceived as atemporal without being "static."

<sup>17</sup> The whole section on *īśvaravāda* in Jayanta's great compendium of the Nyāya philosophy is available in a very good although old edition: Bhaṭṭa (1895, pp. 190–204).

<sup>18</sup> In Pāli Buddhist texts the term under discussion is *kūṭaṭṭho*; it refers to a designation of Ātman and the world by those "eternalists" who were criticised by the Buddha in the 5<sup>th</sup> century B.C. E. and therefore existed and taught in this age. For main contexts in the Pali texts see Rhys Davids & Stede (1993, p. 225).

<sup>19</sup> Boethius (524/2008). Katherine Rogers very aptly refers to Aquinas' analogy of a road on which those who travel can see only what is near them, while someone looking down from the height can see all of them at once (ST I, q.14, a.13) without mentioning that it was borrowed from Boethius (Rogers, 2000, p. 57).

<sup>20</sup> Here I mean in the first place his reasonings in "God is Everlasting" where he constructs such a syllogism as (a) none can know about some temporal event *e* that it is occurring except when it is occurring; (b) given that *P*'s knowing about *e* that it is occurring cannot occur until *e* begins, and since it has an ending, then *P*'s knowing about *e* that it is occurring cannot itself occur beyond *e*'s cessation; (c) hence the act of knowing about *e* that it is occurring is infected by the temporality of *e*; (d) therefore, every *P* (and God is not an exclusion to the rule) as knowing any *e* has to be infected by temporality. So, we have to choose between two great attributes of the traditional God (knowledge and atemporality) and the philosopher summons to sacrifice one of them resolutely to another. See Wolterstorff (2000, p. 499). The paper had aroused a controversy, but Wolterstorff was sure he had succeeded in overcoming his opponents in the atemporalist camp. It seems, however, that the main problem with Wolterstorff's inference lies in the clarification "and God is not an exclusion to the rule", which falls under the traditional error known as *petitio principii* (if we recollect India again it is *sādhya*sama of the Nyāya system, an invalid argument where a thing which needs to be proved is itself cited as a proof). Instead of proving that the constitution of God's means of knowledge is the same as ours, the philosopher states it as something already proved in order to infer therefrom a needful conclusion.

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## Real Argument From the Mundane Zeitgeist

While returning now to the temporalists' explanation of why there are still many theists who continue to adhere to the traditional doctrine of Divine atemporality, we may consider a question proceeding in the opposite direction, i.e., why there are still more numerous theologians today who deny it? One possible explanation is that they are simply getting tired of the transcendental God (one whose rays have drawn, as we saw, numerous eminent thinkers with sound religious reasons and feelings for many ages from very different cultural regions). In truth, the process God, whom many contemporary theologians wish to substitute for the transcendental God who has been venerated during the ages of Christian theology, is of ultimately the same "stuff" as the universe itself, thus not being "not of this world" (John 18: 36) per se but overcomes it more quantitatively (in terms of duration, ubiquity, power, etc.) than in terms of His essentiality and is thus more likely to be its soul than its Creator. Then another question arises concerning why such a God captivates the sympathies of not only super-liberal but also more conservative philosophical theologians. Here we may simply refer to a Zeitgeist that inclines intellectuals to align with evolutionism (regarded as the indisputable foundation of all scientific and therefore rational thinking) as more concomitant with the ideas of a "self-transforming God". Given that evolutionism does not acknowledge any exclusions to its rules, God therefore also cannot be one of them, and should evolve, albeit in His own divine manner, e.g., from the Pure Will into the Trinity etc. Although another possible explanation is still more "practical": the transcendental God is much more exacting than the process God. In past times, theologians taught that God descended to the earth to elevate man (not without the latter's efforts) to heaven, but now a contrary way is virtually offered—to "democratise" God Himself.

This last point deserves attention in the context of some more general approaches to contemporary religiosity in the West, albeit which involve some misunderstandings. It is well known that the conception of post-secular society has been commonly regarded (especially following Jürgen Habermas's manifestos) as a dogma for those involved in religious studies and sociology, which can be only specified, but not placed under question. The majority of sociological reports supporting this doctrine are unanimous in identifying this shift to the post-secular in the spread of new loosely connected, non-confessional networks without doctrinal commitments, in which humanitarian communication is substituted for traditional ecclesiastical authority<sup>21</sup>. From a semantic point of view, it can certainly be questioned whether such a shift should not more properly be called not post-secular but post-religious, since *religiō* was originally derived (at least from the times of Lactantius and Augustine) from "bound" or "connection" between God and humans in the first place, and between the latter (with each other) in the second. However, in the context of a "post-secular" society, these connections resolutely trade places. For this reason, a modest, "more democratic God" is much more suitable than "the royal God" of the former times. Such

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<sup>21</sup> As a cyclopaedia of interpretations of the post-secular, the enormous volume (Beaumont, 2018) can be heartily recommended.

attitudes occur not only in postmodernist “weak theology”, but even in such traditional disciplines as fundamental theology wherein the apology of traditional theism was predominant from the times of Pierre Charron<sup>22</sup>: here, God himself is regarded not as the eternal goal of human aspiration but more as a means for providing human well-being in this world<sup>23</sup>. However, the history of such shifts in religious consciousness and the “subsurface exploration” of “ground displacements” find themselves beyond the scope of this paper.

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<sup>22</sup> This famous Christian apologist and a follower of philosophical scepticism at the same time formulated three main tasks of apologetics which framed the subject matter of the Catholic discipline of fundamental theology for ages: to demonstrate advantages of religious faith over unbelief, of Christianity over other religions, of Catholicism over other Christian confessions, see Charron (1593, p. 3).

<sup>23</sup> A good example of such a sincere shift of theological intentionality in today's Catholic fundamental theology is given in Knapp (2009).

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## ARTICLE

# Saudi National Day: Conservatism Versus Modernity in the Light of Saudi Vision 2030

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### ABSTRACT

This article examines the transformation of Saudi society from traditional conservatism to modernity, as envisioned in the Saudi Vision 2030 plan. Utilizing a descriptive research design, the article explores the processes through which countries emerge and cultivate national identities after gaining independence, and how these identities are reinforced through the celebration of national holidays. The article also delves the challenges confronted by the Kingdom of Saudi Arabia in establishing a cohesive national identity, including the delicate balance between tradition and progress, and the need to address diversity and inclusivity. Significantly, the article concludes that the initial rejection of celebrating the Saudi National Day has evolved into widespread acceptance among Saudi citizens, highlighting the government's pivotal role in guiding the society's shift from conservatism to modernity.

### KEYWORDS

Arab countries, conservatism, modernity, National Day, Saudi society, Vision 2030

## Introduction

The Kingdom of Saudi Arabia (KSA) is undergoing significant social and economic transformations, further amplified by the implementation of Saudi Vision 2030. This ambitious vision includes various programs and initiatives aimed at transitioning the Kingdom from a traditional society heavily reliant on oil revenues to a modern, diversified economy (Al-Rasheed, 2021). As a part of

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this transformation, the Saudi government has made concerted efforts to combine modernity, social justice, and economic freedom. This has involved overruling objections to opening up international markets, allowing women to enter the private sector, standardizing systems and laws governing gender, and working to end gender discrimination (Yamani, 1998).

These sweeping changes, however, have posed significant challenges to the religious authority and traditional power structures within the Kingdom. Despite the resistance from conservative factions, the Saudi government has been proactive in pushing forward with these reforms (Fandy, 1999). The introduction of new laws, policies, and social initiatives has been a key part of this modernization process, as the Kingdom seeks to align itself with global standards and foster a more inclusive and prosperous society (Al-Rasheed, 2021).

Saudi Arabia has always represented a society of paradoxes (Clarke, 2007) where modernity and tradition coexist and restrain each other. The term modernity is understood in a broad sense, encompassing its various impacts on the country, forcing the Kingdom to make a general reevaluation of its economic and demographic basis. According to Ghafar (2018), KSA is witnessing a process of change in its social, financial, and political structures that has not been seen since its founding in 1932.

According to the Saudi Vision 2030 document, one of the objectives is to build on the Kingdom's heritage, values, and Islamic principles. Several decisions have already been made to ensure this national identity, based on the traditional heritage of the Arabic peninsula (Arabism), Islamic values (Islam), and technology (the West) (Vision 2030, n.d.). With a focus on the nation's policies and strengths, Saudi Arabia's Vision 2030 seeks to create social and economic policies that will enable the country to break its dependence on oil exports, create a prosperous and sustainable economic future, improve lifestyles and social cohesion within Saudi Arabian communities, and lift some conservative social restrictions (Alsisy & Alsewiket, 2020).

One of the most prominent contributions to national identity is the National Day celebration (the country's first secular celebration). Secular celebrations such as National Day have divided public opinion. However, the Saudi government supports the celebration and considers it more than just a national holiday. Following the proliferation of this concept, National Day celebrations have been marked by entertainment and consumption.

The key challenges faced by the Kingdom of Saudi Arabia in strengthening its national identity include transitioning from traditional conservatism to modernity (Vision 2030, n.d.), navigating this significant societal shift poses challenges in reinforcing a cohesive national identity, enhancing national identity celebrations, overcoming any initial resistance or rejection of these celebratory practices would be a challenge the Kingdom faces, balancing tradition and progress, striking the right balance between preserving cultural heritage and embracing progress is likely a key challenge, addressing diversity and inclusivity with any nation-building process, ensuring a sense of belonging and representation across diverse segments of the population can be a challenge in strengthening a unified national identity.

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The annual celebration of Saudi National Day on September, 23<sup>rd</sup> provides a useful case study for analyzing theoretical questions around nationalism and state power. As a highly centralized monarchy, the Saudi state plays a dominant role in defining the country's national narrative and symbols (Lacroix, 2011). The elaborate festivities and patriotic displays associated with National Day can be viewed as part of the government's efforts to foster a sense of Saudi national identity and loyalty to the ruling House of Saud (Yamani, 2009). Scholars have debated the extent to which such state-led nation-building projects are successful in generating genuine popular attachment, or whether they merely represent a veneer of unity masking deeper sociopolitical divisions (Aarts & Nonneman, 2005). Additionally, the holiday's celebration of the Kingdom's unification under a single monarch invites analysis of how national narratives can enhance the diversity of Saudi society and the complexities of the country's historical development (Kostiner, 1993). Overall, Saudi National Day provides a useful lens for examining theoretical questions about the construction of national identity and the role of the state in shaping it (Gause, 2011).

The current article discusses the initial rejection and the subsequent acceptance of the National Day celebration. The activities of the day are also described. Thus, the article seeks to answer the following questions:

1. What are the debates surrounding celebrating Saudi National Day as an element of Saudi Vision 2030?
2. What are the aspects of Saudi National Day celebration practices?
3. What are the consequential trends related to the celebration of Saudi National Day?

## Significance

Most publications on Saudi National Day have been from news organizations reporting celebration practices and those previous scholarly articles have focused on Vision 2030. Moreover, these earlier studies of Vision 2030 have stressed economic, social, and political issues (for instance, educational reform and sustainability). Consequently, this research is considered one of the fewest studies examining Saudi National Day as an element of Vision 2030 by shedding light on social processes related to Saudi national identity, and it reviews the transformation of Saudi society from traditional conservatism to modernity.

## Objectives

This article aims to provide a scholarly review based on the literature related to the implantation of Saudi Vision 2030 and its direct link to celebrating Saudi National Day. It sheds light on the debates on Saudi National Day including the initial refusal of celebrating, approval of National Day celebration, celebration practices, and connections to consumer culture.

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## Methodology

The article adopts the descriptive research design to suit its nature. The literature review of this article used data collected from a variety of newspapers, periodicals, publications, published access journals, and government and public portals. The period was from August 2019 to November 2019.

## Definition of Terms

### **Identity**

Identity refers to an individual's sense of self, including their characteristics, beliefs, values, and affiliations (Castells, 2010). It is how a person or group defines and expresses themselves, often about others (Woodward, 2002). Identity can be based on factors such as ethnicity, nationality, religion, culture, gender, or personal experiences, and is a dynamic and multi-faceted concept that shapes an individual's or group's perceptions, behaviors, and interactions (Lacroix, 2011).

In the context of Saudi National Day, identity can be defined operationally as the Saudi citizens' collective sense of belonging, shared cultural values, and national pride that is reinforced and expressed through commemorative events and activities.

### **Nationalism**

Brubaker (2011) defined it as the belief in and promotion of the interests of one's nation, often characterized by a strong identification with the nation's history, culture, and political aspirations. Nationalism in the Saudi National Day celebrations manifests through the emphasis on Saudi history, traditions, and the country's development under the leadership of the ruling monarchy. The celebrations cultivate a sense of patriotism and national unity among the Saudi populace.

### **Sectarianism**

Sectarianism refers to the deep-rooted divisions and conflicts that arise from the differences between various religious or ethnic sects within a society (Wehrey, 2014). In the context of Saudi National Day celebrations, sectarianism is not a prominent feature, as the celebrations are largely focused on promoting a unifying national identity and downplaying any potential religious or ethnic divisions within Saudi society.

## Literature Review

### ***Theme One: Literature Related to the Debates on Celebrating Saudi National Day as an Element of Saudi Vision 2030***

*Islam Versus Secularism.* Islam has affected Saudi Arabian culture, making its historical development and traditions unique from those of other cultures. The most prominent part of Saudi Arabia's cultural identity is Islam and its teachings. Due to the presence of the Two Holy Mosques in Mecca and Al-Medina, the Saudi people are proud to be Muslims and that their country is the birthplace of Islam (Alsisy & Alsewiket, 2020).

Saudi Arabia may face a clash of civilizations as a result of globalization because of its fear of cultural collapse, the dominance of a foreign culture, and the growth

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of international companies, social media, and mass media (Saudi Arabia versus globalization, 2001). Therefore, Islamic institutions in Saudi Arabia have indeed undergone extensive reform as the monarchy consolidates its vision for the future of the nation. Although these reforms are gradual and reversible, taken as a whole they represent a systematic restructuring of the role of religion in Saudi Arabia.

With the advent of Prince Mohammad bin Salman, the country's governing structure is being centralized and remodelled. The religious doctrine is no longer committed blindly to any certain religious school or scholars. This trend started a few years ago before the Crown Prince had his modern viewpoints, and now it is accelerating. The role of Islam in Saudi States and public life is being revolutionized by a combination of procedural reforms and personal changes in the jurisdiction. Most of the changes are technical adjustments, and distribution of duties (Farouk & Brown, 2021).

While Saudi religious institutions are being reorganized, their tools are being reduced to improve political and governance efficiency. These modifications appear to have distinct goals: more vital state centralized control; and removing obstacles to desired political, social, and economic developments (Lacroix, 2019). Many Salafi Muslim scholars believe that all Muslim celebrations should be the same worldwide. Muslims should participate only in religious celebrations. They should reject any celebrations that are irrelevant to Islam (Kreil, 2016).

Islam was not the only religion to reject European secularism; so, did other Abrahamic and non-Abrahamic religions, which called for implementing religious teachings in overall policies and all social laws. Canceran (2016) states that Christians in the Philippines feel the existence of God in their practices and are in a state of worship, not only mentally or through doctrinal synching, but also in emotional engagement with God. Similarly, Ray (2015) has revealed the kind of celebrations during the new Swahili year in Wamiji in Mombasa, where people celebrate Prophet Muhammad's birthday, which many East African Muslims intuitively consider to be an Islamic occasion. On the other hand, there are many discrepancies in Muslim society between secular traditions in governance and society and Islamic rejections of secularism, in addition to the separation of social and political rules from Islam.

The debates surrounding the relationship between national identity and Islamic identity have been a longstanding and complex issue within Muslim intellectual discourse. According to the research, there are a few key points to consider:

1. Tensions between national identity and Islamic unity. The concept of national identity has been viewed by some Islamic intellectuals as a potential threat to the unity of the broader Islamic community (Davis-Packard, 2017). There is a concern that the promotion of distinct national identities can lead to social divisions and the separation of Islamic communities.
2. The historical context of the rise of nation-states. The emergence of the nation-state system, following the fall of the Ottoman Caliphate, has been a significant factor in the development of distinct national identities among Muslim-majority countries (Belkeziz, 2016). This transition from the caliphate to the nation-state model has sparked debates among Muslim scholars and intellectuals.

3. The Egyptian example. The case of Egypt illustrates how the articulation of a distinct national identity, by intellectuals like Refaa Al-Tahtawi, has been a contentious issue (Elsässer, 2014). While some have argued for an Egyptian nationalism consistent with Arab and religious backgrounds, others have viewed this as a departure from a more unified Islamic identity.
4. Balancing national and Islamic identity. The debates surrounding the relationship between national identity and Islamic identity reflect the broader challenge of balancing the need for a distinct national identity with the preservation of a shared Islamic community and values (Davis-Packard, 2017). This delicate balance is an ongoing discussion and contention among Muslim thinkers and scholars.

In summary, the debates over the role of national identity in the context of Islamic communities and the broader Muslim world have deep historical roots and continue to be a subject of significant intellectual discourse and debate.

The conflict of uniting the religious and the national identity was not controversial until the oil boom. At that point, the country took a precise turn between the modern national trend and the Islamic trend. Despite Saudi Arabia, as a conservative Muslim culture with strong Islamic traditions that should be maintained, Islam allows Muslims the freedom to engage and work with people around the world. Hossain (2016) has stressed that radical secularism is undesirable in Islamic societies. History recounts the attempts that failed to impose extreme secularism in Egypt, Iraq, and Tunisia. However, secularism has been more successful when Islam could contribute to national affairs within a democratic framework that merges identities and ethnicities.

Secular ideas have gained acceptance around the world as the governing logic by which differences can be overcome and integration can be pursued. The promise of the secular is that it lessens social divisions and provides a framework for constructing contemporary state issues. Religion has the potential to be a crucial tool for negotiating spatial regimes in daily life. More particular, religion provides people with how they can effectively change their morals and construct new ones (Woods, 2023).

The reason for the tension, anxiety, and instability of values in the Arab community is probably modernity. Arab countries (e.g., Egypt and the Kingdom of Saudi Arabia) have not yet modernized their social, political, or economic systems; however, they are trying to incorporate their religious beliefs and traditions into flexible social, political, and economic systems but they are secular (Estes, 2000).

*The Islamic Resistance to the Celebration of Saudi National Day.* The National Day in the Kingdom of Saudi Arabia dates back to the reign of the founder King Abdulaziz bin Abdul Rahman Al Saud. This day was known during his reign by several names in various sources (Al-Shammari, 2021). According to the Opinions of the Gulf Journal research (Hī't t-thīr, 2015), the recovery of King Abdulaziz in Riyadh and the re-establishment of the Saudi state is a major turning point in the history of the region, as it resulted in a comprehensive renaissance and building an integrated state. It also indicated that since the issuance of the royal decree announcing the unification of the country and naming it after the Kingdom of Saudi Arabia, this day has become a national day for the Kingdom of Saudi Arabia. It led to major political reforms through which it has expanded popular participation.

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After the announcement of the renaming of the Kingdom of Hijaz, Najd, and its Dependencies to the Kingdom of Saudi Arabia on September 23<sup>rd</sup>, 1932, this day became National Day. All territories and cities had been ruled by the King since 1344H (1925 G) after their citizens pledged their allegiance to him. A Riyadh journal mentioned in (Al-Assaf, 2011) published the details of the Kingdom's new name:

On the 12<sup>th</sup> of Jumada-al-Awwal, 1351H (18-9-1932 G), some citizens in Taif and some members of the Consultative Council (Majlis al-Shura) found a necessity to draw up a petition for changing the Kingdom's label into "the Kingdom of Saudi Arabia." This petition was sent to King Abdulaziz who approved it after receiving many other similar ones with the same regard. The Kingdom's elite, scholars, and intellectuals wrote the petition collaboratively. On the 17<sup>th</sup> of Jumada-al-Awwal, 1351H (23-9-1932 G), King Abdulaziz issued a royal decree no. (2716) that states the following:

With reliance on Allah and the basis of the received dispatches from all our subjects in the Kingdom of the Hijaz, Najd and Its Dependencies, and yielding to the desire of the public opinion in our land, and wishing to unite the parts of the Arab Kingdom, we have ordered the following: Article 1. The name of the Kingdom of the Hijaz, Najd, and Its Dependencies shall be changed to the Kingdom of Saudi Arabia, and our title shall be King of Kingdom of Saudi Arabia. (Al-Assaf, 2011)

Unifying celebrations on some occasions among Muslims, and preventing others, has become more complicated now, due to the emergence of national social and cultural entities. Islamists view nationalism as a barrier to the unification of all Muslims (Kreil, 2016). This is why Islamic countries like the Kingdom of Saudi Arabia have not developed a sense of nationalism. Only in the 21<sup>st</sup> century, schools begin to teach courses on nationalism and nationalistic values. Furthermore, National Day became an official holiday, something that many Islamists disapproved of. There was no official celebration or commemoration of the occasion when the Arabian Peninsula was united as the Kingdom of Saudi Arabia (Suleiman, 2003).

Islam and Salafism reject the idea of commemoration of social events, limiting celebrations to the annual religious feasts of Al-Fitr and Al-Adha (Al-Malki, 2016). Other celebrations would lead to undesirable religious innovations. Saudi culture prohibits celebrations other than Al-Fitr and Al-Adha. Many devout Muslims believe that other celebrations are unacceptable because they are not mentioned in Islamic texts. This was announced by the Permanent Committee for Scholarly Research and Ifta' (Al-Dawish, 2010) in its fatwa, in which National Day was denounced as a religious innovation that must not be celebrated (Al-Dawish, 2010). This celebration is the essence of establishing a national country that expands beyond a Muslim national identity. The religious stream rejects the establishment of a national or ethnic country except for the Islamic country, and any celebration related to one country is a distinction that should be avoided (Aldossry & Varul, 2016).

Solarz (2020) in her distinguished article "Religion and International Relations in the Middle East as a Challenge for International Relations (IR) Studies" addressed that

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the appropriate Place of religion in international relations begins with the social changes of the world. She mentioned that the presence of religion extends consideration to the spiritual dimensions of security as they are beginning to be recognized. She also explained how religion is present in international relations at all levels of analysis.

*National Day Supporters as a Symbol of National Identity.* Modernity is a cultural pattern that enhances the national identity of the countries that fought colonization; it is not necessarily related to Islamic identity or Arabism. Elson (2010) has shown that in some countries, like Indonesia, after independence, despite the deep roots of religion in the national identity, there is a distinction between religious and personal spheres, where the Islamic identity does not interfere with the social organization either directly or in the law. According to Podeh (2011), many researchers agreed that analyzing national celebrations is important for understanding the political and social workings, but they differ in the role that celebrations and ceremonies have played in history. The Kingdom of Saudi Arabia, in its pursuit of modernity, administrative, scientific, and technical progress, has become more resolute in strengthening the Saudi identity. This is achieved by emphasizing the unity of the Kingdom and its people, and by fostering a cohesive national identity, despite the diversity of religious beliefs within the country.

Al-Harbash (2020) showed that the National Day for the Unification of the Kingdom is on September 23<sup>rd</sup> as a march of growth and glory referring to the Kingdom's goal to achieve sustainable development. National Days are an important means of emphasizing the personal nature of nationalism of countries. This transformative path to nationalism in Saudi Arabia took place after the terrorist attacks of September 11, 2001 amid demands from modernists to ignore all things or issues irrelevant to Saudi society. The government supported the religious, traditional, and modern uniqueness of the Kingdom of Saudi Arabia and its people. On September 23<sup>rd</sup>, 2005, following the Western model, a royal decree was issued declaring the day a national holiday. The holiday was not for Muslims, as those who celebrated it held liberal views (Aldossry, 2015). Many countries celebrate their national day as a symbol of national unity and solidarity. Independence Day is a day to celebrate national identity, unity, and collaboration. Around the world, national days are dedicated to remembering a country's history, glory, and progress. The national day is an official holiday for all citizens (Edu-Buandoh & Nkansah, 2018).

Promoting inclusiveness and pluralism, eliminating discrimination within the existing citizenship model, and embracing previously marginalized identities are all necessary for the development of strong citizenship with a unified national identity. This view is supported by several scholars in nationalism and citizenship studies. Scholars argue that building a cohesive national identity requires the state to move beyond exclusionary and discriminatory citizenship policies (Kymlicka, 1995). Inclusive citizenship that recognizes and accommodates diverse cultural, ethnic, and religious identities can foster a greater sense of belonging and investment in the nation (Taylor, 1994). Relatedly, the active inclusion of marginalized groups, such as religious or ethnic minorities, can help strengthen the legitimacy of the state and its nation-building project (Gellner, 1983).

Conversely, the failure to address discrimination and embrace pluralism can undermine national unity and lead to the alienation of certain segments of the population (Brubaker, 1992). A unified national identity is more likely to emerge when the state actively promotes equal rights and opportunities for all citizens, regardless of their background (Kymlicka & Norman, 2000). In the context of Saudi Arabia, scholars have highlighted the need for the government to adopt more inclusive citizenship policies and accommodate the diverse identities within the Kingdom to build a stronger sense of national belonging (Lacroix, 2011; Nonneman, 2001). Embracing pluralism and eliminating discrimination would be crucial steps toward developing a unified national identity that resonates with all Saudi citizens.

The reinforcement of national identity in Saudi Arabia should take precedence over other sub-identities, such as tribal affiliations. Regardless of race, gender, or sectarian background, all citizens should have a rightful claim over their country. At the same time, it is emphasized that the national identity should be flexible enough to accommodate the diverse identities of its citizens (Al-Malki, 2016). Identity is not given once and for all. It is not fixed and it is built up and changes throughout a person's lifetime (Maalouf, 2011). According to Custers (2020) in the context of Muslim national identity, Saudi Arabia is undergoing several social, economic, and cultural changes.

Saudi Arabia's recent legislative efforts have focused on promoting the country's national identity and cultural heritage, rather than solely emphasizing its religious foundations. The government has implemented various investments and initiatives aimed at displaying contemporary and historical Saudi culture, as well as the Kingdom's long history as a nation. Furthermore, more investments are shown clearly in the country's cultural heritage and infrastructure. Culture, according to the Saudi Vision 2030 is indispensable to the quality of life, and therefore the Kingdom aims to increase the quality and quantity of its cultural activities. The new Saudi identity was evident from the change from a state with a religious identity to a national identity in which all Saudis are included (University of Exeter, 2022).

Saudi nationalism manifests itself in the government's approval of the introduction of the celebration under a legal cloak. It is a symbol of the unification of the Kingdom of Saudi Arabia and the announcement of its title as a country of full independence and sovereignty, rather than being a day of Independence, as is the case in other Arab countries (Al-Qhatani, 2019).

### ***Theme Two: The Aspects of Saudi National Day Celebration Practices***

There is a clear difference between religious and secular celebrations. The Al-Fitr feast is held to make Muslims happy and to praise Allah at the end of the holy month of Ramadan. The Al-Adha feast celebrates the replacement of the Prophet Abraham's son Ismail with a lamb (Aldossry, 2012). In contrast, secular celebrations, whether National Day or Valentine's Day, are created by cultural patterns (Kreil, 2016). Secular celebrations are encouraged by society.

Celebrations in the Gulf States are not inherently different, given the countries' shared religion, ethnicity, language, and ruling system. This similarity creates a

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cultural and social pattern. In Gulf communities, celebrations of the National Day involve singing national songs, flying flags, and marching in parades.

The conference *Social Change in the Gulf Societies in the 21<sup>st</sup> Century* (n.d.) aimed to explore how economic transformational educational reforms, social media, and rapid urbanization have changed in Gulf societies. The nature of the scope of employment in the Gulf has changed significantly as a result of more men and women joining formal jobs. Interestingly, the economic benefits of gender diversity in the workplace constitute a strong case for work participation that liberates males and females from traditional jobs that provide disposable income that leads to significant social change.

Despite the acceptance of National Day as an official holiday, there have not been many celebrations. The Kingdom has sought to sanctify nationalism by asserting its identity, creating a sense of belonging, and holding its celebrations. The Kingdom has a great interest in establishing a national identity, which is apparent in the cultural and social changes. Along with that, consumer goods play a similar role to religious rituals due to the formation of collective identities through nationalism and religion (Varul, 2008).

Celebrations in Gulf communities differ only in respect of their duration and number. The traditions are not different, for they include family gatherings and social habits. Like other Gulf societies, Saudi society does not prescribe any special social pattern for National Day (Koch, 2016). Since National Day does not coincide with the summer vacation or with any of the endorsed holy feasts that rely on the Hijri calendar, many Saudis use the day to visit relatives or run errands. Families gather and raise the flags of the Kingdom.

Saudi liberals see National Day as a step in the direction of modernity, while conservatives consider it a non-Islamic innovation. However, the opposition has little weight against the royal decree of approval (Aldossry, 2015). Like other social events held by the Kingdom, National Day is an official event. Economic reform in developing countries requires radical cultural and social changes, which can only be introduced from above.

The government has held many big events and festivals around the Kingdom. The media covers these events, to create a new social pattern. In 2019, the General Entertainment Authority held new festivals. The Kingdom hopes to make these festivals part of an annual National Day event. However, it is not easy to evaluate the experience because of its novelty and the fact that it requires many years to instill new social habits (Al-Qhatani, 2019).

Aldossry (2015) investigated the importance of social and religious celebrations and festivals in the KSA and how and what these changes have been influenced by the growing impact of Western consumer culture. He discovered that there has been a major change in Saudi Arabian families' celebrations, both in terms of their nature and the importance assigned to them. The research revealed significant concerns arising from these changes and innovations as threats to traditional beliefs and values, as well as to the stability of the family and, consequently, the entire social fabric. While Al-Qhatani (2019) investigated the manifestations of youth behavior associated with

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the celebrations of the National Day which aimed to find out the patterns of youth behavior associated with the Saudi National Day celebrations in Riyadh. The findings indicated positive aspects of youth behavior associated with the celebrations of the Saudi National Day, represented in the reinforcement and consolidation of citizenship values and the implantation of love of the homeland among youths. The findings also indicated negative aspects of youth behavior associated with the Saudi National Day celebrations represented in the tampering with public and private property as well as national acquisitions; violations of ethical behavior; violations of traffic regulations and abuse of social regulations.

Al-Enezi and Al-Qassas (2014) aimed to construct a proposal to encourage innovative initiatives for Saudi university youth to invest in the National Day from a planning perspective. The proposal managed to develop the spirit of belonging to the homeland and remove the obstacles that prevent young people from being able to put forward their ideas and initiatives.

It is obvious from the literature review that the Kingdom is looking forward to involving the private sector, which is reflected in the concern of the business sector to make National Day an occasion for Saudis to go shopping. Commercials accompanied by national songs offer discounts or offers as a way to increase participation in the celebration. This result is consistent with the findings reported in the studies by Aldossry (2015), Al-Enezi & Al-Qassa (2014), Al-Misbahi (2017), and Al-Qhatani (2019).

### ***Theme Three: The Consequential Trend Related to the Celebration of Saudi National Day***

*Towards Consumerism.* The celebration of Saudi National Day is not solely on the day of celebration, but rather on the year of commemoration. Consequently, the date of the celebration is not fixed but instead changes annually. This contrasts with the approach of many other countries, where the national day is observed on the same calendar date each year, such as the United States' Independence Day on July 4<sup>th</sup>. A significant aspect of the Saudi National Day celebration is the widespread involvement of companies and institutions, which often link their pricing and promotional offers to the occasion. For example, in 2017, to commemorate the 87<sup>th</sup> National Day, numerous businesses announced special discounts and offers of up to 87% to encourage public participation in the festivities (Al-Misbahi, 2017).

Celebrations of the National Day are similar worldwide. Consumerism has become the main stimulus in marketing products and added a consumerist attitude to the features in this day. Many companies display their products on this day and families race to shop as a way to celebrate this day. There had previously been no special celebrations for Saudi families outside of family gatherings or dance festivals (Aldossry, 2015).

Despite the possibility of increased activity, Saudi Arabian consumers continue to be cautious with their spending. The major GCC marketplaces have been under the intense scrutiny of the global consulting firm Kearney, which has been tracking spending patterns and delving deeper for a detailed breakdown by category, channel, sentiment, and motivation (Al-Khatib et al., 2005).

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Nearly 60% of Saudi Arabian consumers expect the economic impact of the pandemic to last for the next six months, and their purchasing patterns reflect this outlook. Since the pandemic began, spending on non-essentials has decreased by more than 25% while spending on necessities has decreased by about 18%. Food, groceries, medications, and health are the main topics. It is interesting to note that expenditure in this category appears to be increasing, with 45% of Saudi customers willing to pay more for better health care and, in certain cases, social responsibility. The expense of non-essentials like clothing and accessories has decreased over the past year. Lockdowns during this time compelled customers to make their purchases online. Although the convenience, range, and cost-effectiveness have made people enamored of a developed e-commerce landscape, this has dominated in offering a higher sense of comfort when purchasing necessary things online (The changing consumer shopping habits in Saudi Arabia, 2021).

In most Western countries, the peak of consumer spending comes at Christmas time, when people exchange gifts. The Christmas season, Birthdays, Mother's Day, and Valentine's Day, are associated with shopping. In contrast, in Saudi Arabia, the access points for consumption practices are Islamic feasts and traditional celebrations (Aldossry & Varul, 2016).

The Kingdom's entertainment sector has become influential on National Day, because of the musical performances, carnivals, and other activities that had never been seen before. These shows and festivals have become the hallmark of National Day celebrations, where the only traditional customs are to attend carnivals and shop the sales. Interestingly, celebrations of National Day have become international, with the presence of Western offers and commercials. In other words, National Day is no longer exclusive to the traditional character of the Kingdom: for example, it features both Arab and Western performers, such as France's Cirque du Soleil.

Ibn Hillel and Ibrahim (2020) asserted that the empowerment of women has been receiving attention on both the national and international levels. The study lies in shedding light on the role of the influential fashion of elite women who enjoy social and political weight in promoting the national identity. Consequently, the active participation of Saudi youth in the carnivals and celebrations surrounding Saudi National Day, as well as their interest in global trends and fashions, suggests a strong sense of belonging and national identity, while also reflecting the influence of worldwide cultural and social developments on this demographic. The link between cultural and economic progress caused by world consumerism can distort the self-representation of Saudi modernity, which has aimed to maintain economic and technological development, as well as spiritual, cultural, and intellectual life (Aldossry, 2012).

## Results

### ***Answering the First Question "What Are the Debates Surrounding Celebrating Saudi National Day as an Element of Saudi Vision 2030?"***

The literature review reveals that the debates surrounding the celebration of Saudi National Day have evolved significantly. Initially, the commemoration of this national

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holiday was viewed within the context of Saudi Vision 2030, leading to some theoretical objections. However, over time, this has shifted to an ultimate acceptance and embrace of the Saudi National Day celebrations among the country's citizens. This transition reflects the government's successful efforts to promote a strong sense of national identity and belonging through these public festivities and events. This result is consistent with the findings of Al-Qhatani (2019), Edu-Buandoh & Nkansah (2018), Hayday (2010), Matei (2013), and Oltean (2018) who examined the importance of National Days to the national identity.

### ***Answering the Second Question “What Are the Aspects of Saudi National Day Celebration Practices?”***

As it follows from the literature review, the Kingdom is looking forward to involve the private sector, which is reflected in the concern of the business sector to make National Day an occasion for Saudis to go shopping. Saudi businesses and companies have leveraged commercials accompanied by patriotic national songs to offer discounts and special deals as a means of encouraging greater public participation in the celebration of Saudi National Day. This result is consistent with (Al-Anazi & Al-Qassas, 2014; Aldossry, 2015; Al-Misbahi, 2017; Al-Qhatani, 2019).

### ***Answering the Third Question “What Are the Consequential Trends Related to the Celebration of Saudi National Day?”***

The literature related to the consequential trend concerning the celebration of Saudi National Day demonstrates the transformation of Saudi society from traditional conservatism to modernity as an element of Saudi Vision 2030. This result is consistent with the findings reported in the studies by Al-Anazi & Al-Qassas (2014), Aldossry (2015), Al-Misbahi (2017), and Al-Qhatani (2019).

## **Discussion**

Nationalism is no longer problematic in many Arab and Islamic countries, such as Tunisia, Morocco, Iraq, and Egypt, as it distinguishes their citizens. Other countries that work with Islamic law, such as the Kingdom of Saudi Arabia, have struggled to facilitate the co-existence of Islamic and national identities, despite the opposition of Islamists.

The Celebration of Saudi society with National Day is still limited to what the public and private sectors provide. In the future, we expect to see new cultural habits, whether consumptive or not, concerning National Day celebrations. Despite the recent surge in the celebration of Saudi National Day compared to neighboring countries, the Kingdom's efforts to foster a strong sense of nationalism and national identity continue. While other nations in the region may have a longer history of grappling with issues related to nationalism, Saudi Arabia's relatively more recent embrace of national celebrations reflects its ongoing journey to understand and solidify the concept of the nation as a whole. This is evidenced by the government's investments in promoting contemporary and historical Saudi culture, as well as the Kingdom's history, through various legislative initiatives and public events.

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Despite Islamic scholars' rejection of National Day, the Saudi government is determined to mark it. This determination has granted many Saudis the ability to overcome barriers and obstacles and express themselves as Saudis, and not just as Muslims or Arabs. Many Saudis now look forward to National Day and the sales associated with it. National Day, like other religious or secular celebrations, is expected to increase consumerism, due to the sales and discounts offered. To sum up, the trend towards national and social reform is inevitable to keep pace with Saudi Vision 2030 and ensure national identity.

### **Recommendations**

In light of the findings, the article recommends encouraging public-private partnerships to develop innovative programs that promote cultural heritage and national identity as part of the Saudi Vision 2030 initiatives, establishing national recognition and reward systems to celebrate individuals and organizations that make exceptional contributions towards the realization of Saudi Vision 2030, integrating the theme of national unity and pride into the design and content of Saudi National Day celebrations to foster a stronger sense of belonging among citizens, leveraging digital platforms and technologies to create immersive, interactive experiences that engage the public, especially the youth, in celebrating Saudi identity and culture, and conducting regular surveys and feedback mechanisms to assess the evolving perceptions and attitudes of the Saudi public towards the national day celebrations and Saudi Vision 2030.

### **Suggestions for Further Research**

The current article presents some suggestions for further research including examining the role of public-private partnerships in driving cultural and social changes under Saudi Vision 2030, conducting quasi-experimental and comparative studies to investigate the effect of implementing Saudi Vision 2030 on improving the quality of life in its various aspects, conducting longitudinal studies to track the evolving perceptions and attitudes of the Saudi public towards the national day celebrations and Saudi Vision 2030 over time, investigating the economic and financial implications of the cultural and social changes associated with Saudi Vision 2030, and conduct further research related to Saudi Flag Day and Saudi Founding Day as one of the new non-religious legal holidays.

### **Conclusion**

This article aims to provide a scholarly review of the literature on the implantation of Saudi Vision 2030 and its direct connection to the celebration of Saudi National Day. It explored the debates surrounding Saudi National Day, including the initial refusal to celebrate it, the eventual approval of the celebration, the celebration practices, and their links to consumer culture. This article examined the transformation of Saudi society from traditional conservatism to modernity as an element of Saudi Vision

2030. It revealed that the rejection of celebrating Saudi National Day gave way to ultimate acceptance among Saudi citizens, with the private sector actively involved in making National Day an occasion for Saudis to go shopping, incorporating national songs and promotional offers. This led to the transformation of Saudi society from traditional conservatism to modernity as an element of Saudi Vision 2030. The researcher suggested increasing public awareness of adhering to Saudi Vision 2030 for national reform.

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ARTICLE

## Exploring Social Identities in Indonesia: The Role of Religious and Ethnic Identities in Evaluating Well-Being

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### ABSTRACT

This study examines the role of religious and ethnic identities on individuals' reported relational well-being (RWB) in Indonesia. Our findings reveal that religious identity significantly impacts life evaluations, with active engagement in religious practices positively correlating with RWB. Conversely, ethnic identity does not demonstrate a significant association with RWB, particularly among younger adults, suggesting that positive religious relationships may supersede ethnic affiliations in well-being assessments. Notably, while particularistic and religiocentrism beliefs do not correlate with RWB, the salience of religious values, such as the principle of treating others as one wishes to be treated, exhibits a positive relationship with life evaluations. This underscores the importance of religious identity over ethnic identity in shaping well-being. The study contributes valuable insights for scholars and policymakers aiming to foster intergroup harmony and enhance life satisfaction through social identity interventions.

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**KEYWORDS**

social identity, religiosity, ethnic identity, relational well-being, Indonesia

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**Introduction**

Research on well-being has experienced increased scholar attention in the past three decades (Armitage et al., 2012; Riasnugrahani et al., 2024; Steptoe et al., 2015; White, 2015). Previous studies have covered the construct development of well-being, its measurement, and its association with various domains of a person's life. The United Nations (UN) has even included it as one of the sustainable development goals (Conceição, 2019). Among the many studies, one thing that is agreed upon is that well-being is an important aspect of human life as it is related to a person's mental and physical health (Salvador-Carulla et al., 2014; Steptoe et al., 2015).

***Relational Well-Being***

Generally, well-being research is categorised into two approaches: objective, e.g., economic, basic needs, life expectancy, and capability; and subjective, e.g., assessment of life satisfaction and quality of life (Diener et al., 1999; Hu et al., 2011; Ryan & Deci, 2020; White, 2008). Each approach focuses on the aspect considered most important in an individual's life. However, White (2015) argued that these approaches have limitations, especially in looking at situations or relationships that occur in the process of achieving well-being; not to mention that contextual knowledge of how societies work in different parts of the world is crucial in investigating well-being. For instance, most individuals living in the Global South prefer to eat together than alone because "to share rice in Bangladesh is to indicate shared identity" (White, 2008, p. 4). A fulfilment of one commodity in some countries, such as rice, is not only a personal satisfaction but also a symbol of social status. Therefore, in evaluating well-being, we should consider the cultural representation of one's society to ensure that personal and societal values of an individual are captured in the assessment.

Following up on this line of idea, we aim to pursue a more contextual approach to understanding the perception of well-being in Indonesian society by incorporating both individualistic and basic needs into a broader framework of socio-psychological needs. This recognizes individuals' well-being as a process, in which they take an active role in achieving it (Armitage et al., 2012). As such, the current study views well-being as an intimate concept, specifically defined by the individual who experiences it, and is deeply rooted in societies in which people live in (White, 2008).

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To this end, we opt to employ the notion of relational well-being (RWB), which defines well-being as an ongoing evaluation undertaken by individuals towards their current state of life involving their subjective, e.g., own self-concept, relational, e.g., sense of security in their living space, and material aspects, e.g., income and access to public facilities (White, 2008, 2015). The three aspects are constantly interrelated, and no aspect is more important than the other. Therefore, White (2015) suggested seeing well-being in a relational framework. By relational, White and Jha (2023) consider individuals as naturally relational beings. This identifies active participation of individuals in their life, rather than mere objects of others. Furthermore, the proposition also recognizes the influence of social interactions, along with social and material environments that surround individuals on their life evaluations or RWB. In addition, White and Jha (2023) claimed that individuals' social relationships are not only to fulfil the identity-formation developmental stage but also to fulfil various life requirements.

In other words, individuals' personal and material attainment only does good when it provides for others, which then allows individuals to achieve a high level of well-being. This implies that individuals view their social relationships not only as a means, but also as an end or value that they aim to achieve. As shown by Jamal et al. (2023), strengthening individuals' social networks is found to have a positive impact on community development in Indonesia, which then relates back to the individuals' personal development. Therefore, actively participating in the community is equally as important as achieving a high level of individual income.

In summary, relational well-being acknowledges the importance of individual context that includes sociocultural aspects that are rooted in specific times and places (Armitage et al., 2012; White, 2015). The attainment of well-being cannot be reduced to just being wealthy or happy, or even a combination of the two. It should be viewed as a constant process of personal achievement that considers the context of one's relationships in a specific time and place.

### ***Social Identity Theory***

The social identity theory explains that individuals naturally identify themselves with certain social groups as an effort to understand their social world (Tajfel, 1974). Once they define their social identity, they socially differentiate themselves from others who are not part of their chosen group, such as ethnic or religious groups. Additionally, individuals constantly compare their social group membership with relevant outgroups (Spears, 2011; Tajfel & Turner, 1979). This tendency has two functions; the first is to maintain or achieve superiority, and the second is to preserve one's uniqueness. As such, not only is social identity integral in individuals' lives, but it is also vital for them to be a part of a certain social identity. Indeed, the social identity provides not only moral support to individuals, but also financial assistance, access to health, and even access to a good physical environment. Recently, Riasnugrahani et al. (2024) demonstrated that family participation, a proxy to individuals' social identity, positively impacts individual resilience. This, in turn, positively associates with their well-being. Hence, social identity is assumed to positively affect individuals' well-being (Phinney et al., 2001; Yip & Fuligni, 2002; Ysseldyk et al., 2010).

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Furthermore, social identity theory posits that individuals' social identities can be seen through their attachment to their ingroup, e.g., to what extent they participate in their ingroup's practices, affective evaluation towards their ingroup, e.g., to what extent they show positive attitudes to the ingroup's norms and beliefs, and centrality, e.g., to what extent they place importance of their ingroup's values (Ashmore et al., 2004; Cameron, 2004). In line with this, we employ Cameron's three-factor social identity model. The first factor is ingroup ties, which refers to individuals' perceptions towards their bond and belongingness with other ingroup members. The second is ingroup affect, which refers to individuals' positive feelings towards their ingroup membership. Finally, the third is centrality, which refers to the degree individuals think about themselves as an ingroup member. The consensus is that the longer they think about their ingroup membership, the more central the identity becomes. Therefore, the concept of centrality is often analogous as identity salience, in which a specific time and situation might determine which identity becomes more salient or important (Setiawan et al., 2020; Yip & Fuligni, 2002), although there are other scholars who distinguish between the two concepts (Stryker & Serpe, 1994). In short, these three factors make up individuals' social identity which plays an important role in individuals' level of well-being (Haslam et al., 2009; Knez et al., 2020; Mccubbin et al., 2013).

*Religious and Ethnic Identities.* Among many social identities, we argue that there are two important social identities—religious and ethnic—that most Indonesians highly regard. In the Indonesian context, religious identity is still perceived as an important identity that provides more personal meaning and significance than most other forms of social identity (Hadiz, 2017; van Bruinessen, 2018). There is a strong emotion involved with religion in Indonesia, such as moral authority that is almost unquestionable (Wellman & Tokuno, 2004). This resonates with a high number of interreligious conflicts recorded in the country (Mengatasi intoleransi, merangkul keberagaman, 2022; Sigit & Hasani, 2021). Similarly, ethnic identity still poses a high authority in certain aspects of most Indonesians' lives. Marriage and community are still developed through shared ethnic identity (Bazzi et al., 2017). Indeed, along with religion, ethnic identity is still politicised to generate collective action among ingroup members (Barron et al., 2009; Humaedi, 2014), although the separation between religious and ethnic identities can often be vague in Indonesia, since certain ethnic identities are historically associated with a certain religious belief. Therefore, these identities have high importance in most Indonesians' life experiences and may provide a significant meaning for their RWB.

The identification with a particular religious affiliation alone results in higher overall individuals' life satisfaction (Bergan & McConatha, 2001). This finding is consistent with a study by Ysseldyk et al. (2010) that claims religious identity does not only provide social support among ingroup members, but is also positively related with mental health and a healthier lifestyle. Further, Yenziaras and Akarsu (2017) scrutinised religious identity in detail, looking at how different religiosity dimensions are related to individuals' life satisfaction. They found that consequential dimension or adopting religious values as a consequence of identifying with a specific religious affiliation, is positively related to life satisfaction.

On the other hand, previous research has shown that by identifying with a certain ethnic group, along with their national identity, individuals are reported to have a higher level of well-being (Phinney et al., 2001). Umaña-Taylor et al. (2014) further suggest that by positively viewing one's own ethnic identity results in a positive regard about the group and thus the self. Ethnic identity has also been found to be a buffer in dealing with racial discrimination in the United States (US), and eventually, is related to increased psychological well-being (Mossakowski et al., 2019), although this relation is found only among foreign-born and not for US-born individuals. This conclusion is consistent with the study by Balidemaj and Small (2019), which found that people with high levels of ethnic identity are positively associated with higher levels of psychological well-being.

### ***The Interplay of Religious and Ethnic Identities and Relational Well-Being***

In connection with the importance of these two social identities, we intend to conduct a study on the relation between religious and ethnic identities on the one hand, and individuals' RWB, on the other. There are two main reasons why this study is important to pursue. Firstly, although scholars agree on the importance of social relationships to individuals' well-being, research related to the Indonesian context is still very rare. Secondly, investigation into well-being using RWB is also uncommon, especially within the Indonesian context. However, the relationality of social and community relations, along with personal accomplishments, is key to developing a positive evaluation of one's state of life.

In this study, we posit the implementation of religious dimensions proposed by Stark and Glock (1970) within Cameron's (2004) three-factor identity framework. According to Stark and Glock (1970), religiosity includes religious practices, beliefs, and consequences (how central religion is in a person's daily life). Religious doctrine is considered to provide a positive aspect of individuals' religious identity (Ysseldyk et al., 2010). By embracing their religious beliefs, individuals are susceptible to particularistic views, in which their own religion is seen as the only true vision of the supernatural, and others will not be saved unless they follow it (Stark & Glock, 1970). Moreover, individual beliefs are also related to religiocentrism, which is a combination of a positive attitude towards one's own religious ingroup and a negative attitude towards outgroup religion (Brewer, 1999; Sterkens & Anthony, 2008). These religious beliefs have been shown to be positively related to individuals' collective efficacy when their community is considering a collective action to ameliorate their state of living (Takwin & Setiawan, 2023). Thus, we expect that by adopting a high level of particularism and religiocentrism, individuals are likely to feel accepted by their religious group thereby, maintaining a good social relationship with ingroup members.

Furthermore, ingroup ties in religious identity can be reflected in the extent to which individuals regularly perform religious rituals and liturgical actions, which can be further divided into formal institutional ritual modes, e.g., attending church, and more private modes of worship practices, e.g., reading scripture and praying privately (Anthony et al., 2015). Religious practices are assumed to strengthen ingroup cohesion by providing opportunities to share experiences, increasing coalition commitment,

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and cooperative behaviors, although not all cooperative behaviors can fall into socially acceptable behaviors (Ginges et al., 2009). However, through religious practices, individuals can gain social support from their religious group. We expect that those who perform religious practices frequently are likely to be accustomed to actively participate in other communal practices in their living space, thus providing them with a sense of accomplishment with their social surroundings.

Lastly, the centrality dimension is reflected in religious identity salience or “the importance of being religious” (Roof & Perkins, 1975). In relation to an individual’s tendency to identify themselves with a religious group that displays more positive than negative aspects, we argue that the importance of religion is not merely about being a follower of a certain religion, but also being a good follower of that religion. This is related to a positive self-evaluation (Luhtanen & Crocker, 1992). We expect that those with high religious salience are likely to care for their relationship with significant others, as well as with their community. Based on this, we hypothesise that religious identity, which is represented by religious practices, beliefs and salience, is positively related to individuals’ RWB (**Hypothesis 1**, or **H1**).

Furthermore, ethnic identity will also be measured using the three-factor social identity model (Cameron, 2004). Ingroup ties in ethnic identity refer to the extent individuals feel they belong to their ethnic group. By having a high level of ingroup ties, individuals are able to participate in their ethnic group practices. Not only will this provide them with social relationships, this might also provide them with social support in times of adversity. Next, ingroup affect in ethnic identity refers to the extent individuals feel positively towards their ethnic group. By having positive evaluation, individuals are able to incorporate their ethnic identity in their global self-evaluation, which then paves a way to a positive self-concept (Umaña-Taylor et al., 2014).

Finally, centrality refers to the extent individuals think about being part of their ethnic group. This notion is important to develop a sense of self-worthiness which, in turn, pertains to developing social relationships with others (Sharma & Sharma, 2010). If individuals constantly hold negative thoughts about their ethnic identity, then this is likely to withhold their subjective attainments and social relationship development. On the other hand, if individuals constantly hold positive thoughts about their ethnic identity, they are likely to develop a sense of pride which enables them to pursue healthy social relationships. Therefore, we predict that individuals’ ethnic identity is positively related to their RWB (**Hypothesis 2**, or **H2**).

To serve the aim of the present study, we will use a mixed data collection method (online and on-site) to gather random samples from the general population living in Jakarta and West Java provinces of Indonesia. The study locations are deliberately chosen as they are melting pots for many Indonesians and thus increase the possibility of collecting information on different religious and ethnic identities. The results of the study provide a contribution to exploring the role of social identity in shaping individuals’ well-being, especially in the Indonesian context. Due to the use of the RWB approach, the findings are expected to be useful for the development of policies and interventions aimed at improving well-being in Indonesia, for example, by promoting positive intergroup relations. Overall, the study aims to answer the

following research question: To what extent are religious and ethnic identities related to individuals' relational well-being among the general population in Indonesia?

## Method

Following the Resilient Indonesian Slums Envisioned (RISE) project launch in 2021, we have followed their footsteps in applying the notion of RWB in a greater context. To do this, we ran a survey using a mixed data collection method (i.e., online and offline) to randomly gather participants from West Java, Banten, and Jakarta provinces in Indonesia<sup>1</sup>. We purposively selected the locations due to their nature as economic migration destinations (Rizaty, 2021). Thus, this selection is probably the most effective way to represent Indonesia's vast urban communities, while the mixed method of data collection is the most accessible method for that purpose (de Leeuw, 2005).

Prior to the survey, we applied for an ethical approval and received a positive response by October 2022 from the university we are affiliated with. The survey was then conducted from October until December 2022. Specifically for the offline survey, we performed a random walk to inadvertently gather participants which started from a purposively-selected address, for instance, from a local sub-district office of a city or from a local university. This method was selected because we did not have access to the local population registry, but it can still be considered a better approximation of the general population than a simple purposive sampling method (Babbie, 1989). In detail, we relied on a dice rolling to determine the random interval of a walk. Once determined, for instance, number three from the dice rolling, we approached the fourth house or address from the starting point. Next, we moved to the seventh house or address from the starting point and kept repeating it until we have reached the target number of participants. We similarly applied the same random method to the online survey. First, we created a mailing list or database which contains participants' emails, obtained by asking our extended networks. Second, we sent out the online survey by randomly selecting people from the database by rolling a dice to determine our starting point (participant's number). Then we used the same number to proceed to the next participant. Table 1 table shows the number of participants gathered in each location.

**Table 1**

*Distribution of Participants by Location and Data Collection Method*

| Location    | Online | Offline | Total |
|-------------|--------|---------|-------|
| Bandung     | 45     | 81      | 126   |
| Bekasi      | 3      | 18      | 21    |
| Cimahi      | 2      | 23      | 25    |
| Cirebon     | 1      | –       | 1     |
| Depok       | –      | 19      | 19    |
| Sukabumi    | 1      | –       | 1     |
| Tasikmalaya | 2      | –       | 2     |

<sup>1</sup> For further explanation of mixed data collection method, see de Leeuw (2005).

**Table 1 Continued**

| Location       | Online      | Offline      | Total      |
|----------------|-------------|--------------|------------|
| Tangerang      | 1           | 19           | 20         |
| Jakarta        | –           | 39           | 39         |
| <i>Overall</i> | 55 (21.65%) | 199 (78.35%) | 254 (100%) |

Based on the data of 254 participants, we found five officially recognized religions in Indonesia. The largest religious affiliation found is Islam with 63%, followed by Christianity (Protestants and Catholics combined) with 31.1%. The rest of the participants practice either Buddhism (3.1%), local indigenous beliefs (1.6%), or Confucius (1.2%). As for ethnicities, we successfully covered various ethnic groups, although the number is not equally distributed. Sundanese is the largest sample group with 33.9%. Betawi comes second with 22.0%, and Chinese-descendants and Javanese are in subsequent positions with 16.5% and 15.7%, respectively. We also acquired participants who are Batak (6.3%), Toraja and Melayu (each with 1.2%), Dayak (0.8%), and Flores and Nias (each with 0.4%). There are four participants who did not disclose specific ethnicity and claimed a national identity instead (1.6%).

**Measures**

We ran confirmatory factor analysis (CFA) in lavaan package in R (Rosseel, 2018) to calculate the validity and reliability of the employed measures. For the validity criteria, we used the following parameters: one, following the work of Hu and Bentler (1999; see also Hooper et al., 2008) on the recommended model-fit estimates, we relied on a combination of two different fit indices in forms of standardised root mean square residual (SRMR ≤ .09) and comparative fit index (CFI ≥ .96). Two, factor loading of each item should be at least .40 in order to be retained (Ellis, 2016). All of the *a priori* factor structures were derived from previous research on each scale.

Finally, we calculated average variance extracted (AVE) to establish a convergent validity for each dimension or a latent construct from each scale. Ideally, the value of AVE of a latent construct should be at least .50 (Fornell & Larcker, 1981). However, if less than the proposed value but the value of composite reliability (CR) of that construct is greater than .60, then the construct can still be considered valid (Fornell & Larcker, 1981, p. 47, Table 8). Finally, we computed Cronbach’s coefficient alpha (α) as well as CR to determine the reliability level. Since coefficient alpha has now been considered a lower bound of the true reliability (based on the classical test theory claim that the true reliability represented by the ratio of true score divided by error), CR complements the calculation of reliability level in a manner that suits with CFA (Peterson & Kim, 2013). We also provide bivariate correlations between variables in Table 2. The following sections delineate all of the scales employed in this study in detail.

*Relational Well-Being Scale.* The scale is a multidimensional scale consisting of six dimensions: (a) community participation, (b) security and competition, (c) subjective material well-being, (d) facility satisfaction, (e) religiosity, and (f) self-concept (Riasnugrahani et al., 2022). However, since we also focused on religious identity,

we modified the original scale by removing religiosity dimension to avoid overly high correlation between the constructs. Family and community participation refers to statement items like “I can participate on the election of neighbourhood leaders without any pressure.” Security and competition dimension refers to items such as “The presence of the newcomer groups threatens my family and my group survival.” Next, subjective material well-being deals with individuals’ satisfaction with their material aspects, such as “I have a good life at the moment.” Facility satisfaction is related to statements concerning individuals’ satisfaction with their access to public facilities, such as “I am satisfied with the access to health facilities.” Finally, self-concept deals with statements concerning one’s confidence and evaluation towards their competence, such as “I am a dependable person.” In total, we ran a validity test on 18 items of RWB (four items in dimensions of community participation, security and competition and self-concept, and three items in facility satisfaction and subjective material well-being).

**Table 2**  
*Bivariate Correlations Between Variables*

| Variables                   | 1    | 2          | 3          | 4          | 5          | 6          | 7          | 8           | 9           | 10          | 11          | 12          |
|-----------------------------|------|------------|------------|------------|------------|------------|------------|-------------|-------------|-------------|-------------|-------------|
| Private religious practices | 1.00 | <b>.27</b> | <b>.41</b> | <b>.36</b> | <b>.40</b> | <b>.34</b> | <b>.38</b> | -.30        | <b>.37</b>  | <b>.22</b>  | -.01        | -.12        |
| Religious attendance        |      | 1.00       | -.01       | .08        | <b>.24</b> | .04        | .11        | -.02        | <b>.21</b>  | -.09        | <b>.17</b>  | .09         |
| Religiocentrism             |      |            | 1.00       | <b>.60</b> | <b>.43</b> | <b>.32</b> | <b>.39</b> | <b>-.46</b> | <b>.23</b>  | <b>.31</b>  | <b>-.27</b> | <b>-.25</b> |
| Particularism               |      |            |            | 1.00       | <b>.39</b> | <b>.23</b> | <b>.21</b> | <b>-.39</b> | .11         | <b>.18</b>  | -.09        | <b>-.17</b> |
| Saliency                    |      |            |            |            | 1.00       | <b>.51</b> | <b>.48</b> | <b>-.51</b> | <b>.38</b>  | .26         | .04         | .09         |
| Ingroup ties                |      |            |            |            |            | 1.00       | <b>.73</b> | <b>-.75</b> | <b>.37</b>  | .44         | -.04        | -.03        |
| Ingroup affect              |      |            |            |            |            |            | 1.00       | <b>-.71</b> | <b>.33</b>  | <b>.23</b>  | -.01        | .02         |
| Centrality                  |      |            |            |            |            |            |            | 1.00        | <b>-.27</b> | <b>-.34</b> | <b>.12</b>  | -.05        |
| RWB                         |      |            |            |            |            |            |            |             | 1.00        | <b>.52</b>  | <b>-.18</b> | <b>-.17</b> |
| Age                         |      |            |            |            |            |            |            |             |             | 1.00        | <b>-.31</b> | <b>-.20</b> |
| Educational level           |      |            |            |            |            |            |            |             |             |             | 1.00        | <b>.31</b>  |
| Income level                |      |            |            |            |            |            |            |             |             |             |             | 1.00        |

Note. \*Bold indicates significance at the  $p < .05$  level.

Based on the first three models of CFA, we found that the data did not fit the model. The model-fit indices turned out to be poor and some items have low factor loading (two items from security and competition dimension). After removal of those items, the subsequent analysis still shows a poor fit model. More items were also shown to have low factor loading; two items from self-concept dimension and one item from dimensions of security and competition and subjective material well-being. Further, we noticed that two items in community participation were highly correlated ( $r = .92$ ) and each of those items were highly correlated with another item as well ( $r = .91$ ). Therefore, we had to remove those two items, leaving community participation dimension with two items only. On the other hand, one item from public facility satisfaction dimension was also found to be double loaded in another dimension, which we had to remove and thus leaving the dimension also with two items. In the end, we resorted to Pearson correlation to validate all two-item dimensions of RWB. The inter-item correlation in

each dimension was found to be significantly correlated, ranging from .38 (subjective material well-being) to .82 (security and competition). In the analysis, we obtained the score of RWB by totalling all remaining items and dividing them by the number of items ( $N = 10$ ) (Appendix).

*Religious Identity Scale.* We combined the notions of social identity theory from Tajfel and Turner (1979) and Cameron's (2004) social identity model to assess individuals' religious identity (see Setiawan et al., 2020 for further synthesis of these theories). The former claims that once people decide to identify themselves with a particular social identity, here religious identity, they tend to view their religious group positively in comparison to other relevant groups (Spears, 2011; Tajfel & Turner, 1979). The latter then proclaims that this identification is encapsulated in three dimensions of social identity (Cameron, 2004). First, ingroup ties which refer to the extent to which individuals perform religious practices. Second, ingroup affect which refers to the extent to which individuals express their attitudes towards their religious beliefs. Third, centrality which refers to the extent to which individuals perceive the importance of their religious values.

Based on the above understanding, ingroup ties were assessed by using two items for private religious rituals participants usually perform, namely reading and praying, on a seven-point scale. The Pearson correlation between the two items is significant,  $r = .27, p < .05$ . In terms of public practices, we used a simple question of "How often do you go to religious services in mosques, churches, temples or other places of worship?" and asked participants to rate on a seven-point scale.

Next, ingroup affect was assessed by using particularism and religiocentrism scales. A three-item particularism scale was used to evaluate how much individuals believe that their religious doctrines represent the absolute truth on statements, such as "The truth about God is found only in my religion" (Anthony et al., 2015). The CFA shows a good-fit model,  $\chi^2 = 2.74, p < .00, CFI = .99$  and SRMR = .04. Also, the reliability is found to be a moderate level ( $\alpha = .74$ ) with a high level of CR (.91).

As for religiocentrism scale, it asks to what extent individuals show favourable attitudes towards their own religious group and negative attitudes towards other religious groups (Sterkens & Anthony, 2008). Positive attitudes are defined as good qualities of one's own religion (e.g., "My religious group is best able to talk meaningfully about God"), whereas negative attitudes are defined as opposing characteristics of other religious groups (e.g., "Other religions only talk about doing good deeds without practising them"). Participants were asked to rate themselves on a five-point scale on both measures. Initially, the CFA shows a poor-fit model due to a low factor loading of one item ("Other religions are often the cause of religious conflict"). After the removal, the second CFA shows a good-fit model,  $\chi^2 = 0.11, p < .00, CFI = .99$  and SRMR = .01, while its reliability is shown to be in a moderate level ( $\alpha = .71$ ) with a high level of CR (.80).

Finally, centrality was assessed using a three-item religious salience scale by Eisinga et al. (1991). On a five-point scale, participants were asked to what extent they agree with statements, such as "My religious beliefs have a great deal of influence on how I relate with others." The CFA demonstrates a good-fit model,  $\chi^2 = 12.86,$

$p < .00$ , CFI = .96 and SRMR = .08. The scale is also found to be highly reliable ( $\alpha = .83$ ) accompanied with a moderate level of CR (.73).

*Ethnic Identity Scale.* Similar to religious identity scale, we adopted Cameron's (2004) social identity model and this time, we also employed its social identification measure to investigate the level of ethnic identification among participants. The scale consists of three dimensions, namely ingroup ties, ingroup affect, and centrality, which tallies up to a total of 16 items. Ingroup ties ask participants to rate themselves on a five-point scale on statements like "I feel strong ties to other ingroup members of my ethnic group." Ingroup affect asks participants to rate themselves on a five-point scale on statements, such as "In general, I'm glad to be a member of my ethnic group." Whereas centrality asks participants on statements, such as "I often think about the fact that I am a member of my ethnic group."

The first two CFA models show poor results, due to low factor loadings in two items of centrality and each item in ingroup ties and ingroup affect. After the removal of those items, the CFA shows a good-fit model,  $\chi^2 = 122.52$ ,  $p < .00$ , CFI = .96 and SRMR = .04, while the unstandardised factor loadings for each dimension range from middle to high level (from .41 to .94). Finally, the reliability for each dimension is found to be in the moderate to high range, with centrality having the lowest  $\alpha$  of .77 and ingroup affect having the highest  $\alpha$  of .90.

*Individual Characteristics.* We asked direct questions to determine the participants' age and gender. Additionally, we gathered information on their educational attainment, ranging from 1 = no schooling to 6 = a Master's degree or higher. Lastly, we inquired about their monthly gross household income, which could fall between less than Rp. 500.000 to Rp. 6.000.000 or higher. Table 3 provides the descriptive analyses for all variables.

## Results

Table 3 presents descriptive analyses of all variables involved in the study. We find that there is a significant difference in most variables between participants gathered through online and offline methods. Specifically, although both sample groups scored highly on RWB (above three out of maximum five) we find that offline participants reported slightly higher scores on RWB ( $M = 3.26$ ,  $SD = 0.38$ );  $t(254) = -3.81$ ,  $p < .05$ ).

**Table 3**

*Descriptive Analysis of All Variables by the Level of Risk Perception*

| Predictors                  | Range | Online group |      | Offline group |      | t test<br>(Cohen's d)      |
|-----------------------------|-------|--------------|------|---------------|------|----------------------------|
|                             |       | M            | SD   | M             | SD   |                            |
| Private religious practices | 1–7   | 5.00         | 1.46 | 5.77          | 1.08 | <b>-3.68</b> ( $d = .60$ ) |

**Table 3 Continued**

| Predictors                        | Range | Online group |           | Offline group |           | <i>t</i> test<br>(Cohen's <i>d</i> ) |
|-----------------------------------|-------|--------------|-----------|---------------|-----------|--------------------------------------|
|                                   |       | <i>M</i>     | <i>SD</i> | <i>M</i>      | <i>SD</i> |                                      |
| Religious attendance              | 1–7   | 3.27         | 1.34      | 2.95          | 1.13      | 1.61 ( <i>d</i> = .26)               |
| Religiocentrism                   | 1–5   | 2.59         | 0.80      | 3.13          | 0.94      | <b>-3.91</b> ( <i>d</i> = .62)       |
| Particularism                     | 1–5   | 3.00         | 1.12      | 3.10          | 0.94      | -.58 ( <i>d</i> = .10)               |
| Salience                          | 1–5   | 3.92         | 0.81      | 4.21          | 0.71      | <b>-2.51</b> ( <i>d</i> = .38)       |
| Ingroup ties                      | 1–5   | 3.59         | 0.54      | 3.96          | 0.77      | <b>-4.06</b> ( <i>d</i> = -.55)      |
| Ingroup affect                    | 1–5   | 3.95         | 0.43      | 4.46          | 0.59      | <b>-7.19</b> ( <i>d</i> = .98)       |
| Centrality                        | 1–5   | 2.91         | 0.67      | 2.21          | 0.89      | <b>6.26</b> ( <i>d</i> = .88)        |
| RWB                               | 1–5   | 3.03         | 0.44      | 3.26          | 0.38      | <b>-3.81</b> ( <i>d</i> = .39)       |
| <i>Individual characteristics</i> |       |              |           |               |           |                                      |
| Age                               | 18–62 | 21.76        | 4.82      | 32.26         | 13.47     | <b>-3.90</b> ( <i>d</i> = 1.03)      |
| Gender (male as reference)        | 0/1   | .90          | .31       | .59           | .49       | –                                    |
| Educational level                 | 1–6   | 5.16         | 0.96      | 3.98          | 0.67      | <b>10.44</b> ( <i>d</i> = 2.22)      |
| Income level                      | 1–8   | 6.13         | 2.35      | 5.43          | 1.99      | <b>2.22</b> ( <i>d</i> = .32)        |

Note. \*Bold indicates significance at the  $p < .05$  level.

Next, we proceed to Table 4 to investigate the extent to which religious and ethnic identities relate to RWB. We performed multiple regression analyses in a step-wise fashion to understand the changes, if available, in each model. First, we hypothesised that dimensions of religious identity, represented by religious practices, beliefs, and salience, are positively related to RWB (**H1**). Based on the regression analyses, we find that only private religious practices ( $b = 0.08, p < .05$ ), i.e., reading and praying, and religious salience ( $b = 0.14, p < .05$ ) are significantly related to RWB. This finding suggests that those who often read sacred scriptures, pray individually and conform to their religious values are more likely to have higher level of RWB. Whereas the other dimensions are found to be either non-significantly related or have an inverse relation, i.e., particularism, with RWB. Based on this, we conclude that **H1** is partially confirmed, with only private religious practices and religious salience able to be used to predict RWB.

**Table 4**

*Stepwise Regression on RWB (N = 250), With Standard Error in Parentheses*

| Predictors                  | Model 1           | Model 2           | Model 3           |
|-----------------------------|-------------------|-------------------|-------------------|
| Intercept                   | <b>2.11</b> (.14) | <b>1.68</b> (.37) | <b>1.91</b> (.34) |
| <i>Religious identity</i>   |                   |                   |                   |
| Private religious practices | <b>0.08</b> (.02) | <b>0.07</b> (.02) | <b>0.06</b> (.02) |
| Religious attendance        | 0.03 (.02)        | 0.04 (.02)        | <b>0.05</b> (.02) |

**Table 4 Continued**

| Predictors                        | Model 1            | Model 2           | Model 3            |
|-----------------------------------|--------------------|-------------------|--------------------|
| Religiocentrism                   | 0.05 (.03)         | 0.04 (.03)        | -0.01 (.03)        |
| Particularism                     | <b>-0.06</b> (.03) | -0.05 (.03)       | -0.03 (.03)        |
| Salience                          | <b>0.14</b> (.04)  | <b>0.10</b> (.04) | <b>0.11</b> (.04)  |
| <i>Ethnic identity</i>            |                    |                   |                    |
| Ingroup ties                      |                    | <b>0.13</b> (.05) | -0.02 (.05)        |
| Centrality                        |                    | 0.04 (.04)        | 0.04 (.04)         |
| Ingroup affect                    |                    | 0.01 (.06)        | 0.11 (.06)         |
| <i>Individual characteristics</i> |                    |                   |                    |
| Age                               |                    |                   | 0.01 (.00)         |
| Gender (male = 0 as reference)    |                    |                   | <b>-0.10</b> (.05) |
| Educational level                 |                    |                   | 0.04 (.03)         |
| Income level                      |                    |                   | -0.01 (.01)        |
| Adjusted $R^2$                    | .20                | .22               | .40                |

Note. \*Bold indicates significance at the  $p < .05$  level

Second, we proceeded to Model 2 by factoring ethnic identity dimensions and hypothesised that these dimensions are positively related to RWB (**H2**). Similar to the previous model, we only find ingroup ties to be positively related to RWB ( $b = 0.13$ ,  $p < .05$ ). This suggests that individuals who feel that they belong to their ethnic group and are similar to other ethnic group members are more likely to have a higher level of RWB. As such, **H2** is partially accepted.

Finally, to avoid making a false conclusion by having a spurious effect due to individual characteristics, we built Model 3 by including all the previous variables and adding individual characteristics. Here, we find that most of our earlier findings do not change, except that now religious attendance is shown to be positively related to RWB ( $b = 0.05$ ,  $p < .05$ ) and ingroup ties' relation is no longer present. Specifically, age is found to be positively related, although very small ( $b = 0.01$ ,  $p < .05$ ), and males are found to have a higher level of RWB. Thus, we find that there is no substantial spurious effect of both religious and ethnic identities in the presence of individual characteristics. Based on this, we can safely conclude that those who are over 30 (mean age for all samples) and are male, and more frequently perform religious practices (both private and public) and conform to their religious values, are more likely to have a higher level of RWB.

## Discussion

The present study aims to investigate to what extent social identities in Indonesia are related to individuals' evaluation towards their present life, or conceptually known as RWB. Using a contextual knowledge of the country, we take two of the most highly relevant social identities to serve the aim of the study, namely religious and ethnic identities (Barron et al., 2009; Hadiz, 2017; van Bruinessen, 2018). Based on our robust regression analyses, we find that religious identity is evidently still regarded more highly over ethnic identity in explaining individuals' RWB. The following paragraphs will explore the findings in detail.

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Before we discuss the findings further, it is important to reiterate that we purposively selected RWB instead of other popular well-being notions, such as subjective well-being (SWB), mainly because RWB takes the relationality of important aspects of an individual's life into account (White, 2008). These aspects involve subjective (e.g., self-concept, social relationships), societal (e.g., access to public facilities), and material (e.g., material well-being). However, the main strength of RWB does not lie in the inclusion of these three aspects, but rather its emphasis on the relationality of these aspects (White, 2015). By adding the fact that Indonesians mostly still live in a collectivist manner, in which individuals are encouraged to care for their family, their social relationships and their surroundings (French et al., 2008; Sterkens & Anthony, 2008), RWB is the perfect fit to explain individuals' evaluation towards their current state of life. In predicting it, there is no better identity than religious and ethnic identities that have often sparked collective action for better and worse (Hadiz, 2017; Takwin & Setiawan, 2023; van Bruinessen, 2018).

In regard to the findings, first, we find corroborating evidence that religious identity is still placed as an important influence in how people evaluate their current state of life. Historically, religiosity has been successfully used to push forward national agenda, e.g., family planning (Menchik, 2014), and to this date, it still plays a crucial role in a political agenda and policy making (Hadiz, 2017; Mulia, 2011). By religiosity, we mean actively participate in religious attendance as well as private religious practices, such as praying. Ginges et al. (2009) and Al Qurtuby (2013) demonstrated that religious practices are able to bring religious adherents together to trade ideas and opinions towards their ingroup as well as their outgroups. Although their study is focused on conflicts and peacebuilding, the underlying mechanism shows that religious identity indeed plays an important part in people's lives. The adoption of a particular religious identity enables individuals to fulfil their needs of self-concept, social relationships and, sometimes, also their material needs. Specifically for religious practices, those who frequently attend religious services are also more likely to interact with their ingroup members thus, providing a means to fulfil their social needs and their religious group's needs (Setiawan, et al., 2020). More importantly, religious practices enable individuals to fulfil their self-need of being close to their "creator" (Stark & Glock, 1970). As such, in this study, we find that those who perform religious practices frequently are shown to develop higher satisfaction with their current state of life.

As for religious beliefs, which are represented by particularism and religiocentrism, we find that they are not related to individuals' RWB. We suspect that this is due to the very nature of ideological dimension of religious identity. Since religious doctrines often constrain individuals from genuinely caring for religious outgroup members, e.g., some Muslim communities in Indonesia strongly advise to only vote for Muslim candidates (Hadiz, 2017), the ideological dimension will be an opposite of individuals' ongoing process of achieving balanced and positive social relationships. In relation to individuals' relationships, Riasnugrahani et al. (2024) claimed that religious beliefs can be a protective factor for individuals, but they can also harm their family and community when they promote prejudice and intolerance. In fact, Yeniaras and Akarsu (2017) found that the ideological dimension is non-linearly related (U-shaped relation) with life satisfaction

in their study. They suggest a similar reasoning; being too strict of a religious adherent prevents them from having a balanced satisfaction of the material and spiritual needs.

Furthermore, we also find that religious salience is positively related to individuals' RWB. This suggests that the golden rule of religious values of one's religion, such as treating others as one would like to be treated, is more important than religious norms of one's religious group (Baumard & Boyer, 2013). By looking at RWB through a microscopic lens, individuals are expected to be an active agent in pursuing their individual attainments, while at the same time, caring for their social relationships and providing beneficial acts to the society (White, 2015). This implies that in their process of achieving self-success, individuals strive to act benevolently to families and people who are in need, even if those are their disturbing neighbours. Only through this act are individuals able to feel achieve and maintain a high level of RWB; individuals are expected to do well to feel well. Therefore, those with a high level of religious salience are likely to show positive evaluation towards their current state of life.

Second, we find that ethnic identity is not associated with RWB. Due to the addition of individual characteristics, particularly age, the relation between ingroup ties and RWB disappears, whereas, at the same time, religious attendance becomes related to RWB. There are two explanations for this. One, age has been shown to be positively associated with individuals' RWB, in which older adults report more meaningful and positive relationships (Birditt et al., 2021; Stone et al., 2020). By this, we assume that similarity in ethnicity may no longer play an important role in older aged adults; what matters is whether their relationships provide positive support or not. Meanwhile, age has also been found to be linearly related to individuals' religiosity, which is often represented by more frequent religious attendance (Bengtson et al., 2015; Hayward & Krause, 2013). By becoming more involved in religious attendance, ethnic identity may become less relevant, especially in individuals' social networks.

Theoretically, religious identity is often regarded as more important than any other identity (Ysseldyk et al., 2010). As a belief system, religion is expected to be taken whole heartedly by its adherents and even when it contradicts with other belief systems, e.g., ethnic beliefs, religious doctrine should be taken as the absolute truth. This is especially true in Indonesia. Despite the fact that one can convert to another religious affiliation, it has been shown to be a difficult and often life-threatening event which disallows the thought among most Indonesians (French et al., 2008). Altogether, this paves the way for religious identity to become more highly relevant in determining individuals' RWB.

Notwithstanding the important findings that the current study has drawn, we also acknowledge some limitations in the study. One, we acknowledge that some of our sample groups do not represent the cities they live in due to a small number acquired, e.g., Cirebon and Sukabumi. Therefore, the findings should be taken carefully to avoid over-generalisation. Two, considering that RWB is a process which fluctuates depending on the time and space in which they exist, cross-sectional data is limited to fully explain RWB and the plausible temporal changes among the measures. Therefore, we recommend that future studies aim to pursue longitudinal associations which may open a possibility of causal interpretation, if indeed, changes in religious and ethnic identities precede the change in RWB.

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## Conclusion

To conclude, the study has provided valuable insights into the relationship between social identities and individuals' evaluations of their current life, conceptualised as relational wellbeing in the Indonesian context. By focusing on religious and ethnic identities, we found that religious identity plays a more significant role than ethnic identity in shaping individuals' perceptions of their well-being. In this time of uncertainty and ever-changing society, this aligns with historical trends where religiosity has become more influential in individuals' lives and in shaping political discourse and policymaking.

Our findings indicate that active participation in religious practices fosters a sense of community and fulfills various personal needs, leading to greater life satisfaction. However, we also recognize that certain ideological dimensions of religious beliefs can hinder well-being by promoting exclusionary attitudes towards outgroup members. This highlights the complexity of religious identity, where the benefits of communal ties may be undermined by rigid doctrinal adherence. Fortunately, our findings indicate that if individuals highly value their religious values, such as empathy and altruism, over religious group norms, they will still be able to foster positive social relationships thus enhancing their well-being. This reinforces the notion that individuals who prioritise benevolent actions towards others are likely to experience greater satisfaction in their lives.

In summary, this research underscores the importance of understanding social identities within the framework of RWB, particularly in a diverse society like Indonesia. This contribution provides important insights for scholars and policy makers in developing interventions aimed at promoting life satisfaction through positive intergroup relationships and interreligious harmony. It also calls for further exploration into how these identities interact with various dimensions of well-being, offering a pathway for future studies to investigate the broader implications for social cohesion and individual fulfilment.

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**Appendix**

**Final Analysis on RWB Scale (N = 254)**

| Construct   | Unstandardized factor loadings<br>(standard errors) |                             |                                      |                              |                    |
|---|---|-----------------------------|--------------------------------------|------------------------------|--------------------|
| Relational well-being   | F1<br>Community participation                       | F2<br>Facility satisfaction | F3<br>Subjective material well-being | F4<br>Security & competition | F3<br>Self-concept |
| I can participate in the elections of neighbourhood leaders without any pressure        | <i>r</i> = .82                                      |                             |                                      |                              |                    |
| I can participate in the elections of President and Vice President without any pressure |   |                             |                                      |                              |                    |
| I am satisfied with the access to health facilities from my neighbourhood               |   | <i>r</i> = .64              |                                      |                              |                    |
| I am satisfied with the access to educational facilities in my neighbourhood            |   |                             |                                      |                              |                    |
| I feel my saving can cover the emergency needs of my family                             |   |                             | <i>r</i> = .38                       |                              |                    |
| I have a better job/business compared to my friends                                     |   |                             |                                      |                              |                    |
| The presence of the newcomer groups threatens my family and my group survival           |   |                             |                                      | <i>r</i> = .63               |                    |
| I experienced physical threats while living in this neighbourhood                       |   |                             |                                      |                              |                    |
| I am a hard worker  |   |                             |                                      |                              | <i>r</i> = .51     |
| I am a reliable person  |   |                             |                                      |                              |                    |



ARTICLE

## Sociology of Russophilia in Azerbaijan: A Classification for Russophile Social Groups

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### ABSTRACT

Azerbaijan, which has long historical, cultural, and political and economic relations with Russia, has various Russophile social groups formed during the period of independence. This study aims to classify the Russophile social groups in Azerbaijan and generalize their characteristics, naming each social group according to its motivation. In this regard, according to the results of the research conducted among Azerbaijanis over the age of 18 in 2022–2023, there are six Russophile social groups in Azerbaijan, which can be called Ethnic Russians, Russian-educated, Communists, Nostalgics, Dependents, and Iranophiles. Each of these social groups has different motivations and different characteristics in relation to Russia and Russian culture. This gives a reason to suggest that there is a mosaic view in relation to Russia and Russian culture in Azerbaijan. According to results of the research, social groups in Azerbaijan exhibit a shared desire for improved relations with Russia and a common interest in promoting the Russian language. Anti-American sentiments pervade some groups, signaling a geopolitical alignment away from the West. Notable differences include Iranophiles' religious ties to Iran, Dependents' economic focus on Russia, and varied emphases among Nostalgists, Communists, Russian-educated, and Ethnic Russians, reflecting nuanced geopolitical perspectives within the overarching Russophile sentiment.

### KEYWORDS

pro-Russian sentiment, Azerbaijan, social identity theory, group motivation, post-Soviet studies, political sociology, cultural nostalgia

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## Introduction

Ethnophilia and ethnophobia are concepts widely utilized in ethnic studies to describe positive or negative sentiments toward particular ethnicities or nations. Ethnophilia denotes a deep admiration or affection for a specific culture, often linked to historical, linguistic, or ideological affinities (Thompson, 1987). Similarly, sinophilia and sinophobia—concepts related to China—have been extensively explored in previous studies, highlighting how these sentiments shape societal and political attitudes (Peyrouse, 2016). Similarly, in modern politics, Russophilia and Russophobia represent two opposing trends that shape international relations. Russophilia is driven by admiration for Russia’s cultural heritage, political traditions, and geopolitical influence. It is often seen in nations with historical ties to Russia or in groups that support multipolarity in global politics. Countries like Serbia as well as certain political movements in Europe and the Middle East express Russophilic sentiments, advocating for stronger partnerships with Russia (Jahangirli & Jabarov, 2023). In contrast, Russophobia reflects wariness or skepticism toward Russia’s role in global affairs, influenced by historical tensions and geopolitical rivalries. This sentiment tends to dominate in regions such as Western Europe (Gutorov et al., 2023).

Furthermore, the sociological significance of language in shaping post-colonial relationships is profound, especially in Francophone countries. The French language, as a colonial legacy, continues to serve as a bridge between France and its former colonies, facilitating cultural, educational, and economic ties. Studies show that Francophonic sentiment remains largely positive due to the pervasive influence of the French language, which still holds prestige in many African nations as a symbol of education and global connection (Abu-Haidar, 2000; Laroussi, 2003). This linguistic attachment often results in a favorable view of France, as the language acts as a tool for upward mobility and international engagement (Siradağ, 2014; Uchehera, 2014). However, this sentiment is not without its complexities; while French continues to wield soft power, there are growing critiques of its neo-colonial influence (Chafer & Majumdar, 2023). Thus, language plays a dual role, that is preserving cultural ties while also serving as a reminder of colonial dominance.

Such concepts are crucial for understanding how nations and ethnic groups engage with each other at both cultural and ideological levels. In the context of Russophilia, authors like Petsinis (2016), Jahangirli and Jabarov (2023) have employed this concept to describe the cultural and ideological bonds that specific social groups in various countries maintain with Russia. Their studies emphasize that Russophilia represents more than just political alignment; it encompasses a complex, historically rooted attachment to Russian culture, language, and geopolitical influence, making it a distinct area of study in sociology.

The concept “Russophilia” was chosen for this study because it conveys stronger and deeper connections than the more general concept “pro-Russian sentiments.” Russophilia reflects not just positive sentiments towards Russia but also enduring cultural, linguistic, and ideological attachments that influence social behavior

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and attitudes at a more profound level, which makes it a more suitable concept for examining the targeted social groups in this research.

Russophilia refers to a conceptual framework utilized to denote a sentiment of reverence and affection towards Russia, encompassing an appreciation for its historical legacy, cultural heritage, and societal traditions (Ivanov et al., 2015, p. 148). The emergence of Russophilia dates back to the 19<sup>th</sup> century (Ripetsky & Sereda, 1993). Subsequent to that period, numerous transformations have occurred pertaining to the conceptualization and historical trajectory of Russophilia. In contemporary times, Russophilia has evolved into a notion closely tied to the interests of the Russian state, elevating it to a matter of national concern. The utilization of Russophilia as an instrument of public diplomacy by Russia in various nations has become an integral component of its strategic endeavors (Putin: *Russkii iazyk*, 2021). Russophiles constitute the primary social foundation for such endeavors in the realm of public diplomacy. Undoubtedly, within this framework, one of the central objectives pursued by the Russian state is to augment the ranks of Russophiles, initially focusing on countries within its sphere of influence, and subsequently extending its reach to a broader geographical scope (Chvarkov: *Kul'turnaia ekspansiia*, 2016). In this regard, the study aims to explore the main sociological characteristics and features of Russophiles in Azerbaijan. Qualitative methods, particularly unstructured interviews, were chosen as the primary means of collecting in-depth, nuanced data to address the research objectives.

Thus, the main purpose of the study is to provide a classification of pro-Russian social groups in Azerbaijan based on the analysis of the qualitative research conducted.

The differentiation of pro-Russian groups is important for several reasons. Firstly, it allows for a more nuanced understanding of the various motivations and characteristics that drive these groups, which are often diverse in nature. By differentiating the various forms of pro-Russian sentiment, such as those rooted in cultural nostalgia, economic connections, or ideological perspectives, researchers can gain a clearer understanding of the impact and significance of these groups within society. Moreover, this allows policymakers to more effectively evaluate their influence in both national and broader contexts. Additionally, such classification helps in identifying the distinct factors that contribute to the formation of these groups, providing a clearer picture of their social dynamics and internal structures.

### **Historical Dynamics of the Formation of Rusophile Social Groups in Azerbaijan During the Independence Period**

The third president of Azerbaijan (from October 1993 to October 2003) Heydar Aliyev, upon assuming leadership, initiated a gradual departure from the policies implemented by the previous nationalist government and adopted a new approach. He actively endeavored to improve the negative sentiment towards Russia and the Russian language that had been cultivated within Azerbaijan. During the nationalist government's tenure, there were discussions regarding the potential removal of Russian-language instruction from Azerbaijani schools, causing apprehension

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among the Russian government. It is important to note that Azerbaijan has maintained a bilingual education system since 1991, where both Azerbaijani and Russian languages are used as media of instruction across all educational levels. Students have the freedom to choose their language of study. In his interactions with Russian government officials, Heydar Aliyev reassured them of his commitment to uphold and preserve this educational framework (Əliyev, 2011, p. 365). The decision to maintain the utilization of Russian as a medium of instruction in the Azerbaijani education system was met with great satisfaction by the Russian government officials. This practice not only served as a means to preserve Russian culture within Azerbaijan but also prevented a potential exodus of a larger segment of the ethnic Russian population from the country. By ensuring the continuation of Russian language instruction, Azerbaijan was able to retain at least a portion of its Russian community, thereby facilitating the preservation of Russian cultural influence. Furthermore, this factor played a significant role in laying the groundwork for a renewed sense of affinity towards Russia, known as Russophilia, among the Azerbaijani population in the subsequent years.

Another important process should be noted here. In the 1990s, a large number of people from most of the post-Soviet countries, as well as from Azerbaijan, went to work in Russia (Hosner et al., 2018, p. 11). The majority of these migrant workers, predominantly male, faced limitations in accessing white-collar employment due to their lack of qualifications. As time passed, the influx of migrant workers into Russia grew significantly, resulting in a division by nationality, with each group “specializing” in particular sectors. For instance, Azerbaijanis predominantly engaged in the sale of fruits and vegetables within the market sector. This arrangement had significant benefits, including reducing the unemployment rate in smaller countries that were still in the process of developing their economies and generating foreign currency inflows. Importantly, both Russia and the migrant workers derived advantages from this migration. Russia benefited from a readily available and inexpensive labor force, while the migrant workers’ families had a direct stake in Russia’s economic development and security, as it directly impacted their well-being. As a result, an increasing number of individuals in Azerbaijan developed sympathies toward Russia over time.

Concurrently, Azerbaijan, akin to other nations in the South Caucasus and Central Asian region, faced arduous economic conditions. With the collapse of the economic system of the USSR, a deep production and export problem arose in these countries. The manufacturing industry of the USSR was scattered in all countries and was interconnected (Zapol’skis, 2017). If a car was manufactured in Baku during that period, it relied on a complex network of interdependent economic relationships within the USSR. Not all the components necessary for production were sourced locally; instead, various parts were obtained from different cities across the Soviet Union. For instance, tires were acquired from Tbilisi, glass from Yerevan, engines from Moscow, and brake systems from Ashgabat. These components, in turn, comprised raw materials originating from yet other cities within the USSR. For instance, the rubber used in tires produced in Tbilisi might have been sourced from Kiev, while metal parts could have come from Minsk. The production process of such a product thus hinged upon the economic interdependencies among different cities. Consequently, following the dissolution of the USSR, the disruption of

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these economic ties constituted a significant factor contributing to a profound economic crisis in the affected countries (Zapol'skis, 2017).

Over time, individuals naturally drew comparisons between the advancements in their daily lives and the period of the USSR. Subsequently, some individuals who observed a higher standard of living and greater well-being during the Soviet era began to experience a sense of nostalgia for that period. A significant portion of the general populace attributed their difficulties and economic hardships to the collapse of the USSR, leading to a deep resentment towards Mikhail Gorbachev, the final General Secretary of the Communist Party of the USSR. This sentiment was further fueled by the events of January 1990. During this period, the notion that "Gorbachev single-handedly dismantled the USSR" gained popularity among the people (Mamedov, 2019, p. 2).

The economic difficulties in the 1990s made people nostalgic for the USSR as well as communism. Many social policy measures implemented in the USSR, such as free education, free health care, official induction and employment by state institutions (Cəfərli, 2021), were things that were not easily accessible to Azerbaijanis in the first years of independence. Upon learning that in the USSR university graduates were directly assigned employment, an unemployed person who had recently completed their studies could not help but yearn for a return to the USSR and, consequently, to communism. Similarly, an unskilled unemployed youth, upon hearing from their parents about the guaranteed employment provided by state institutions in the USSR, naturally developed a fondness for the era of the USSR and its communist policies. It is important to note that not all individuals held this perspective during that period. Supporters of nationalism, Pan-Turkism, and the pursuit of freedom believed that attaining independence outweighed the allure of material prosperity (Musavi, 2018). At this time, the nation was divided into those who wished for the USSR and supporters of independence. But still, in a country that faced 50% unemployment in 1993 and 1763.5% inflation in 1994, as well as lost two-thirds of its industry (Prezident Kitabxanası, 2016), it is understandable that people miss the stable economy of the USSR.

It is undeniable that the expression of nostalgia for the USSR and communism carries an implicit longing for the Russians and the Russian government. This observation suggests that the difficult economic circumstances of the 1990s not only did not diminish the affinity towards Russia, but rather intensified it within Azerbaijan. Concurrently, it further reinforced the existing profound support for communism in the country, thus significantly contributing to the perpetuation of communist ideals among future generations in Azerbaijan.

Another essential aspect deserving attention is the relaxation of border controls and the consequent influx of individuals pursuing education abroad, including religious education, following Azerbaijan's attainment of independence. It is noteworthy that during the 1990s, Iran's interest in the southern regions of Azerbaijan, where a significant population of ethnic Persians, particularly the Talish people, reside, experienced a noticeable upsurge. The influence of religious interests on Azerbaijani society is a broad and multifaceted subject that merits dedicated analysis in

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a separate article. A significant number of young Azerbaijanis from these regions opted to seek religious instruction in Iran, which entails a duration exceeding that of secular education. The duration of religious education typically spans from seven to 12 years, depending on the individual's aspirations and objectives (Oqtayqızı, 2021). As a result, a remarkable phenomenon emerges whereby a young individual who embarks on a journey to Iran at the age of 18 becomes deeply entrenched in the sphere of Shia culture until reaching the age of 25–30. Empirical data demonstrates that clergy members who have received religious education in Iran and subsequently return to Azerbaijan demonstrate a clear inclination towards the Iranian state and its religious authorities. Essentially, a significant proportion of individuals who have undergone religious instruction in Iran reintegrate into their homeland as advocates of Iranophilia.

Initially, the connection between Iranophilia and Russophilia may not be readily apparent on the surface. However, upon closer examination, a correlation becomes evident within the context of Azerbaijan. Since the 1990s, Azerbaijani society has been marked by a division between two distinct political orientations: a Western orientation encompassing the United States, Europe, and Turkey, and an Eastern orientation encompassing Russia. In this framework, individuals with a preference for Iranophilia tend to adopt a strongly adversarial position against the Western orientation. It is worth noting that a significant number of Azerbaijani Iranophiles harbor sentiments of anti-Americanism, Europhobia, and Turkophobia. Consequently, they align themselves with the Eastern orientation, where Russia holds a prominent position. In some cases, driven by the adage "The enemy of my enemy is my friend," certain Iranophiles eventually transition into the realm of Russophilia. As a result, Azerbaijanis who have received religious education in Iran have played a distinct role in the propagation of Russophilia within the country.

Ilham Aliyev, who came to power after Heydar Aliyev in 2003, continued father's policy in relations with Russia, as well as in the protection of the Russian language in Azerbaijan. In Azerbaijan, the Russian-language education system was kept as it was. However, gradually, especially in recent years, some post-Soviet countries began to gradually reduce and eliminate Russian-language education (Sarıyeva, 2022). These applications increased the pressure on Russian-language education, which is already a matter of dispute every year in Azerbaijan. However, Aliyev's government did not make any changes in this field. At the same time, President Ilham Aliyev promised that the Russian language will be preserved in Azerbaijan during his meeting with Vladimir Putin in Moscow in February 2022:

Regarding schools, I would like to clarify a bit. There are about 340 schools in Azerbaijan where education is in the Russian language, and more than 140,000 children study in these schools. More than 15,000 citizens of Azerbaijan are studying in the Russian language sections of higher educational institutions. In my opinion, this is a very important basis of our relations and our future relations, because the Russian language has always united the countries of the former Soviet Union, and of course, without knowledge of the Russian language, it will be very difficult to arrange the relations of future generations. Therefore, as I said,

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it is a very important factor in our life. (Prezident İlham Əliyev, 2022; Trans. by Jahandar Jabarov)

As can be seen from İlham Aliyev's words, he views the Russian language as a unifying force and considers it important to regulate relations between the future generations of Azerbaijan and Russia. Acknowledging the annual disputes surrounding Russian-language education in Azerbaijan, President Aliyev committed to maintaining the status quo and highlighted the historical significance of the Russian language as a unifying factor among former Soviet Union countries. In quantifying the impact, Aliyev provided specific details, noting that approximately 340 schools in Azerbaijan offer education in Russian, with over 140,000 children studying in these schools and more than 15,000 citizens enrolled in Russian-language sections of higher educational institutions. The President framed the preservation of the Russian language as a crucial basis for relations, stressing its historical importance and its role in facilitating connections among the nations of the former Soviet Union. Delivered in a diplomatic tone, Aliyev's statements also reflect the geopolitical context, notably in the context of Azerbaijan's relations with Russia, underscoring the importance of linguistic continuity for future generations and bilateral ties.

The intricate web of cultural, historical, and political and economic interactions, coupled with the discernible stance of the Aliyev government towards Russia and the Russian language, necessitates a pressing inquiry into the presence of Russophile social groups in Azerbaijan, the distinctive characteristics of these social groups and discern the impact of government policies on shaping their attitudes.

## Methodology

The research transpired progressively between the years 2022 and 2023, extending over a duration of two years. In pursuit of this objective, iterative field research endeavors were undertaken on multiple occasions within the geographical confines of Azerbaijan. The methodology of the research is given in the Table 1. In this context, methodology aspects such as participant selection, criteria for diversity, challenges in recruitment, sample size rationale, interview duration and structure, ethical considerations and triangulation are given and their explanations are shown.

**Table 1**

*The Methodology of the Research*

| Aspect of the Methodology | Explanation  |
|---------------------------|--|
| Participant Selection     | A total of 300 potential participants were initially approached face-to-face, where the concept of Russophilia was explained. Out of this pool, 75 individuals self-identified as Russophiles and became the focus of detailed interviews  |
| Criteria for Diversity    | To ensure diversity and representation, participants were selected from various demographics, including university students, housewives, and individuals from different urban and rural settings, resulting in a broad representation of the Russophile population in Azerbaijan |

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**Table 1 Continued**

| Aspect of the Methodology        | Explanation   |
|----------------------------------|---|
| Challenges in Recruitment        | One primary challenge in participant recruitment was participant hesitation due to concerns about potential political scrutiny. Participants were reassured that their political views were not the focus, and measures were taken to address fears of public censure                   |
| Sample Size Rationale            | The sample size was determined based on the diversity of backgrounds, ensuring representation across different sections of the population. The inclusion criterion was being over 18 years old, with no additional restrictions   |
| Interview Duration and Structure | During the interviews, participants were asked five main questions common to all, followed by additional definitive questions based on their responses. Each interview comprised approximately 12–14 questions in total   |
| Ethical Considerations           | Two main ethical considerations were addressed. Firstly, participants were not compelled to answer questions they were uncomfortable with. Secondly, written and signed consent was obtained, ensuring the voluntary participation of individuals in the research                       |
| Triangulation                    | To enhance the validity of findings, triangulation methods were employed. Observational data were gathered to compare insights obtained through interviews with participants' actual behaviors and practices, providing a more comprehensive understanding of Russophilia in Azerbaijan |

Beyond employing the triangulation method detailed in Table 1, the validity and reliability of participant-provided data are further substantiated through extensive longitudinal observations conducted in authentic settings. Moreover, in recent years, supplementary observations within the realm of social networks have been undertaken to enhance the robustness of the data.

### Current Classification of Russophile Social Groups in Azerbaijan

In Table 2, Russophiles in modern Azerbaijan are classified into six groups: Ethnic Russians, Russian-educated, Communists, Nostalgics, Dependents, and Iranophiles, based on their motives and sources. Certainly, it should be noted that within these groups, there are further subdivisions and numerous smaller groups that coexist alongside the six major groups mentioned. However, due to the abundance of subcategories, encompassing all of them within a single research is impractical. Hence, our focus in this article revolves around the examination of the most prominent Russophile groups. This classification is rooted in a comprehensive analysis of the motives and sources elucidated by respondents during in-depth interviews. The purpose behind this categorization is to effectively generalize and classify the diverse array of motives and sources expressed by individuals identifying as Russophiles. By delineating these social groups, it is aimed to provide a structured framework that encapsulates the multifaceted nature of Russophilia in Azerbaijan, allowing for a nuanced understanding of the varied motives and sources and sociocultural

dynamics inherent within each social group. This methodological approach facilitates a systematic examination of the sociological characteristics, perspectives, and affiliations that collectively contribute to the overarching classification of Russophiles in the contemporary Azerbaijani context.

**Table 2**

*Classification of Russophiles in Contemporary Azerbaijan According to Their Motives and Sources*

| Russophiles      | Motives and Sources             |
|------------------|---------------------------------|
| Ethnic Russians  | Belonging to the Russian nation |
| Russian-educated | Proximity to Russian culture    |
| Communists       | Communism past                  |
| Nostalgists      | Missing the USSR                |
| Dependents       | Economic dependence on Russia   |
| Iranophiles      | Hatred of the Western world     |

As depicted in Table 2, each of the six groups possesses distinct motivations for embracing Russophilia. Ethnic Russians espouse Russophilia due to their innate sense of affinity and belonging to the Russian nation. Azerbaijani individuals educated in Russian institutions develop a cultural bond with Russia through language acquisition, exposure to Russian national and cultural values, as well as consumption of Russian media and engagement with Russian social networks. This cultural kinship serves as their primary impetus for embracing Russophilia. The group of Communists holds admiration for Russia's communist history and aspires for the establishment of communism within modern Azerbaijan. Their Russophilia primarily stems from the Soviet Union's status as the largest communist state in the world, and the Soviets being the most extensive communist society globally. Nostalgists, despite the passage of three decades since the collapse of the USSR, continue to yearn for its existence. Their longing arises from the enduring influence of memories from their youth, the comparatively weaker state of Azerbaijan's industrial sector in comparison to that of the Azerbaijan SSR, and perceived inadequacies in Azerbaijan's social policies. Dependents, as implied by their name, rely on the Russian economy for their sustenance. Their Russophilia is driven by the desire for Russia to maintain strength and stability, free from any sanctions or embargoes, as their livelihood heavily depends on currency flows from Russia. Lastly, Iranist-religious individuals have been inspired by the close ties between Russia and Iran since the 1990s. Shared antipathy towards the Western world in both countries has fostered closer relations between their leadership and societies, exemplified by the adage "the enemy of my enemy is my friend." This, like the Iranians (Farmanesh, 2018, p. 11), prompted the Azerbaijanis, who were influenced by the Persian culture, to sympathize with Russia. Most likely, if this group had lived in the years of World War II, it would not have had such a positive attitude towards Russia. At the same time, this segment, which condemns the Azerbaijan government's establishment of warm relations with Israel, is against Aliyev's government.

**Ethnic Russians**

The analysis of the interviews reveals distinctive sociological characteristics within the group identified as Ethnic Russians in Azerbaijan. This ethno-cultural cohort exhibits multifaceted attributes that shape their identity, attitudes, and affiliations. The following sociological dimensions encapsulate the essence of Ethnic Russian social group in the Azerbaijani context (Table 3).

**Table 3**

*Sociological Dimensions Within the Ethnic Russian Social Group in Azerbaijan*

| Sociological Dimensions                         | Characteristics Within Ethnic Russians  |
|---|---|
| Heritage and Linguistic Identity                | Individuals with a familial background that includes either both parents or at least one parent of Russian origin, where the primary language is Russian, reflecting a linguistic identity intricately connected with Russian religious and cultural values |
| Transnational Family Ties                       | Maintaining familial connections with Russia or other post-Soviet countries through relatives residing there  |
| Attitudes towards Russian-Azerbaijani Relations | Expressing a vested interest in fostering warmer relations between Russia and Azerbaijan  |
| Cultural Integration and Language Proficiency   | The inclination to foster Russian culture and establish Russian-speaking environments in Azerbaijan is accompanied by the challenge of effective communication in the Azerbaijani language  |
| Acceptance of Russian Perspectives              | Alignment with Russia’s historical, political, and ideological perspectives   |
| Sentiments towards the USSR                     | Expressing admiration for the Soviet Union, reflecting nostalgia for a bygone era   |
| Geopolitical Orientations                       | Some individuals exhibit anti-American sentiments, while others hold Europhobic views   |

Table 3 succinctly organizes the key sociological dimensions and their corresponding characteristics within Ethnic Russian group in Azerbaijan. The delineated attributes of the ethnic Russian social cohort in Azerbaijan resonate with the tenets of cultural and identity theories in sociology. Specifically, the Cultural Identity Theory, positing that individuals derive their sense of self and affiliation from communal cultural facets, substantiates the circumstance of this social grouping (Lecours, 2000). The identified characteristics, such as linguistic identity, familial bonds, and alignment with Russian religious and cultural values, signify a robust cultural identity prevalent among ethnic Russians in Azerbaijan. Moreover, the manifestation of nostalgia for the Soviet Union and admiration for Russia’s historical, political, and ideological tenets underscores a collective cultural identity molded by historical experiences.

Additionally, the application of the Social Identity Theory contributes to comprehending the dynamics within the ethnic Russian social assemblage. This theory asserts that individuals categorize themselves and others into social groups

based on shared traits, fostering a collective sense of belonging and identity (Collier, 1988). In the context of ethnic Russians in Azerbaijan, the shared linguistic heritage, familial associations, and cultural values collectively contribute to the establishment of a distinctive social identity within the broader Azerbaijani societal framework.

Hence, the amalgamation of Cultural Identity Theory and Social Identity Theory furnishes a comprehensive framework to substantiate the circumstances surrounding the ethnic Russian social group in Azerbaijan, elucidating the manner in which shared cultural and identity components configure their attitudes, predilections, and interactions within the sociopolitical milieu of the nation.

### ***Russian-Educated***

The examination of interviews reveals distinctive sociological attributes within the group identified as Russian-educated individuals in Azerbaijan. This cohort, consisting of Azerbaijanis with educational backgrounds spanning from elementary school to higher education, exhibits a spectrum of characteristics that delineate their identity, cultural affiliations, and geopolitical perspectives. The following sociological dimensions encapsulate the essence of Russian-educated social group in the Azerbaijani context (Table 4).

**Table 4**

*Sociological Dimensions Within the Russian-Educated Social Group in Azerbaijan*

| Sociological Dimensions                        | Characteristics Within Russian-Educated Group   |
|--|---|
| Linguistic Proficiency and Language Challenges | Russian-educated individuals exhibit a high proficiency in the Russian language, akin to their mother tongue. However, some encounter challenges in speaking the Azerbaijani language               |
| Cultural Engagement                            | Acquaintance with Russian literature, music, and art underscores their cultural familiarity with Russia. Additionally, some individuals actively share and engage with elements of Russian culture  |
| Advocacy for Russian-Speaking Environment      | A notable segment expresses interest in fostering a Russian-speaking environment within Azerbaijan  |
| Partial Acceptance of Russian Perspectives     | Russian-educated individuals exhibit a nuanced stance, partially accepting Russia's approach in history, politics, and other domains  |
| Social Networks                                | Establishing diverse social networks, some individuals maintain many friendships with ethnic Russians   |
| Sentiments towards the USSR                    | A subset of this social group expresses admiration for the Soviet Union, reflecting nostalgic sentiments  |
| Geopolitical Orientations and Europhobia       | The Russian-educated cohort encompasses individuals with varying geopolitical orientations, including both anti-American sentiments and Europhobic views, indicating complex geopolitical attitudes |

This sociological analysis illuminates the multifaceted nature of Russian-educated group in Azerbaijan, shedding light on their linguistic proficiency, cultural engagement, and nuanced geopolitical perspectives that collectively contribute to their sociocultural identity. The characteristics exhibited by Russian-educated

group in Azerbaijan align with aspects of Cultural Capital Theory and Social Identity Theory in sociology, providing a nuanced understanding of their situation. Cultural Capital Theory, proposed by Pierre Bourdieu, can be applied to justify the situation of the Russian-educated social group. According to this theory, individuals accrue cultural knowledge, skills, and behaviors that confer social advantages (Öztürk, 2020). In the context of Russian-educated group, their high proficiency in the Russian language, cultural familiarity with Russian literature, music, and art, and active engagement with Russian culture reflect a form of cultural capital. This cultural capital not only shapes their identity but also positions them within a distinct social group with shared cultural attributes.

Additionally, Social Identity Theory is relevant in understanding the dynamics of Russian-educated group. This theory suggests that individuals categorize themselves and others into social groups based on shared characteristics, fostering a sense of belonging (Hogg & Williams, 2000). In the case of the Russian-educated individuals in Azerbaijan, their linguistic proficiency, cultural familiarity, and nuanced geopolitical orientations contribute to the formation of a distinct social identity within the broader Azerbaijani context. Therefore, Cultural Capital Theory and Social Identity Theory together provide a comprehensive theoretical framework to justify the situation of the Russian-educated social group in Azerbaijan, elucidating how their cultural capital and shared identity elements influence their perspectives and interactions within the sociocultural landscape.

**Communists**

The sociological analysis of the Communists segment in Azerbaijan reveals a distinctive set of ideological, geopolitical, and cultural characteristics. This cohort, defined by its adherence to the ideology of Marxism–Leninism, exhibits a complex combination of beliefs and affiliations that shape their sociocultural identity. The following sociological dimensions encapsulate the essence of Communists social group in the Azerbaijani context (Table 5).

**Table 5**  
*Sociological Dimensions Within the Communists in Azerbaijan*

| Sociological Dimensions   | Characteristics Within Communists  |
|---|--|
| Marxist–Leninist Ideology and Perception of Nationalists              | Communists in Azerbaijan adhere to the ideology of Marxism–Leninism, indicating a commitment to the principles and tenets of communism, while perceiving nationalists in the image of fascists, suggesting a negative association with nationalist ideologies                                    |
| Anti-American Stance  | This social group adopts an anti-American stance, reflecting a geopolitical orientation that opposes American influence  |
| Desire for USSR Reconstruction and Admiration for Former USSR Leaders | Communists express a desire for the reconstruction of USSR communism, highlighting a nostalgic aspiration for the historical political structure, and there is admiration within the group for former USSR leaders, suggesting a reverence for historical figures associated with the Soviet era |

**Table 5 Continued**

| Sociological Dimensions                           | Characteristics Within Communists  |
|---|--|
| Turkophobia, Europhobia, and Cultural Affiliation | Communists exhibit Turkophobic and Europhobic views, indicating negative sentiments towards Turkish cultural and geopolitical influences as well as aversion to European cultural and political elements; however, while not fully aligned, they partly share Russian culture, indicating a cultural connection influenced by their ideological stance |
| Cosmopolitan Orientation                          | The majority of Communists in Azerbaijan demonstrate a cosmopolitan orientation, reflecting a global and inclusive perspective   |

This sociological analysis offers insights into the intricate combination of ideological, geopolitical, and cultural factors that define Communists group in Azerbaijan. Their distinctive beliefs and affiliations contribute to a unique sociocultural identity within the broader context of Azerbaijani society. The characteristics exhibited by the Communists in Azerbaijan align with aspects of Ideological Theory in sociology, offering insights into the justification for the situation of this social group. Ideological Theory, broadly encompassing political and cultural ideologies, can be applied to understand the situation of the Communist social group (Freeden, 1998). The adherence to Marxism–Leninism, the desire for the reconstruction of USSR communism, and the negative association with nationalist ideologies signify a shared political and cultural ideology within this group. Ideological Theory posits that individuals with common ideological perspectives form cohesive social groups (Freeden, 2006), and in the case of Azerbaijani Communists, their ideological alignment creates a distinct social identity within the broader sociopolitical context.

To sum up, Ideological Theory provides a comprehensive theoretical framework to justify the situation of the Communist social group in Azerbaijan, elucidating how shared ideological perspectives and cultural elements shape their attitudes, preferences, and interactions within the sociopolitical landscape.

### ***Nostalgists***

The sociological analysis of the Nostalgists group in Azerbaijan reveals a distinctive set of characteristics rooted in experiences and sentiments tied to the Soviet era. This cohort, primarily comprised of individuals who studied and spent their youth in the USSR, exhibits a unique sociocultural identity shaped by historical affiliations. The following sociological dimensions encapsulate the essence of Nostalgists social group in the Azerbaijani context (Table 6).

**Table 6**

#### *Sociological Dimensions Within the Nostalgists in Azerbaijan*

| Sociological Dimensions                             | Characteristics Within Nostalgists   |
|---|--|
| Soviet Educational Background and Aging Demographic | Nostalgists, individuals who received their education in the USSR, reflect a formative period shaped by Soviet educational institutions and represent a relatively older segment of society, having spent their youth in the USSR, thus influencing their perspectives |

**Table 6 Continued**

| Sociological Dimensions  | Characteristics Within Nostalgists   |
|--|--|
| Linguistic Identity  | Nostalgists can speak Russian as their mother tongue, emphasizing a linguistic identity deeply rooted in Soviet-era cultural and educational practices   |
| Admiration for Former USSR Leaders and Disdain for Mikhail Gorbachev | Nostalgists express admiration for former USSR leaders, reflecting a sense of reverence for historical figures associated with the Soviet regime, while simultaneously harboring negative sentiments towards Mikhail Gorbachev, suggesting a distinct disapproval of his role in the later years of the USSR |
| Desire for USSR Social Policy Model                                  | This segment of Russophiles desires the social policy model of the USSR, indicating a nostalgic yearning for the societal structures and policies prevalent during the Soviet era  |
| Admiration for the Russian State                                     | Alongside their affinity for the USSR, Nostalgists express admiration for the contemporary Russian state, reflecting a continuity of positive sentiments towards Russian governance  |

This sociological analysis provides insights into the unique characteristics and perspectives of Nostalgists group in Azerbaijan. Shaped by their experiences in the Soviet era, these individuals exhibit a sociocultural identity marked by linguistic ties, nostalgic sentiments, and a nuanced stance on both historical and contemporary political landscapes. The situation of Nostalgists in Azerbaijan is intricately connected with Collective Memory Theory (Licata & Mercy, 2015), as their characteristics and perspectives reflect a collective construction of memories rooted in their formative period within the USSR. The linguistic identity deeply embedded in Soviet-era cultural and educational practices forms a central aspect of the collective memory, as the shared experience of speaking Russian as their mother tongue serves as a key marker of their historical and cultural background.

The admiration for former USSR leaders and the expression of negative sentiments towards Mikhail Gorbachev underscore the selective nature of their collective memory (Hirst & Coman, 2018), emphasizing positive associations with historical figures aligned with the Soviet regime while harboring disapproval for events perceived as detrimental to that era. This selective memory contributes to the formation of a distinct collective identity within the Nostalgist social group.

The nostalgic yearning for the social policy model of the USSR further reinforces the collective memory, as Nostalgists hold onto perceptions of societal structures and policies prevalent during the Soviet era. This yearning signifies a shared memory of a specific socioeconomic model that has left a lasting imprint on their perspectives. Moreover, the positive sentiments expressed towards the contemporary Russian state highlight a continuity of favorable perceptions, connecting their present attitudes to the historical memory of the Soviet regime. This linkage suggests that the collective memory of the USSR extends beyond the temporal boundaries of that era and influences their contemporary views.

In essence, the characteristics of Nostalgists in Azerbaijan, when viewed through the lens of Collective Memory Theory, reveal a dynamic interplay between shared memories, linguistic identities, and cultural practices. The theory provides a comprehensive framework for understanding how historical recollections shape

the unique situation of the Nostalgist social group, illuminating the ways in which collective memories influence their attitudes, preferences, and interactions within the sociocultural landscape of Azerbaijan.

### **Dependents**

The sociological analysis of the Dependents group in Azerbaijan reveals a distinct set of characteristics shaped by economic dependencies and familial ties to Russia. This cohort, primarily defined by their reliance on financial support and economic connections with Russia, demonstrates a unique sociocultural identity influenced by transnational economic dynamics. The following sociological dimensions encapsulate the essence of segment of the Dependents in the Azerbaijani context (Table 7).

**Table 7**  
*Sociological Dimensions Within the Dependents in Azerbaijan*

| Sociological Dimensions                                   | Characteristics Within Dependents  |
|---|--|
| Economic Dependency on Russia                             | Dependents have at least one family member or close relative working in Russia, establishing a vital economic link between their households and the Russian labor market   |
| Financial Needs and Interest in Ruble Appreciation        | Members of this group, reliant on capital from Russia, indicate a financial dependence on external sources and express a keen interest in the appreciation of the Russian ruble, as it directly impacts their financial stability  |
| Impact of Sanctions                                       | Sanctions imposed on Russia have a significant and direct/indirect effect on Dependents, underscoring the vulnerability of their economic situation to geopolitical events   |
| Interest in Bilateral Relations and Economic Developments | Dependents exhibit a notable interest in the warming of Russian-Azerbaijani relations, reflecting a desire for enhanced diplomatic ties that could potentially benefit their economic circumstances, while concurrently closely following economic and political developments in Russia, demonstrating an awareness of the factors that impact their economic well-being |

This sociological analysis sheds light on the unique characteristics of Dependents social group in Azerbaijan, emphasizing their economic interdependence with Russia and the consequential impact on their sociocultural identity. The dimensions explored underscore the intricate relationship between economic dependencies and sociopolitical interests within this group. The situation of Dependents in Azerbaijan can be aptly understood through the lens of Dependency Theory. Dependency Theory is a sociological perspective that explores the asymmetrical relationships between developed and developing countries, emphasizing economic dependence as a central feature (Hills, 1994). In the context of Dependents in Azerbaijan, this theory provides insights into the dynamics of their sociopolitical and economic circumstances shaped by their reliance on another country, particularly Russia.

Dependency Theory posits that less developed nations can become economically dependent on more developed nations, leading to imbalances in power, influence, and economic stability (Angotti, 1981). In the case of Azerbaijani Dependents, their economic link to Russia, manifested through family members working in the Russian

labor market, establishes a tangible form of dependency. This economic reliance on Russia shapes their perspectives, interests, and affiliations.

The keen interest expressed by Dependents in the appreciation of the Russian ruble and their vulnerability to sanctions imposed on Russia further underscores the economic interdependence highlighted by Dependency Theory. Their economic well-being is intricately tied to the economic conditions in Russia, emphasizing the asymmetrical nature of the relationship between the two countries. Moreover, the Dependents' expressed interest in the warming of Russian–Azerbaijani relations aligns with Dependency Theory's emphasis on the diplomatic and political dimensions of dependency. The desire for enhanced diplomatic ties reflects an awareness among Dependents that improved relations could potentially benefit their economic circumstances.

### ***Iranophiles***

The sociological analysis of the Iranophiles group in Azerbaijan reveals a distinctive set of characteristics deeply rooted in religious, cultural, and geopolitical affiliations with Iran. This cohort, predominantly composed of Shiite individuals with connections to Iranian education and culture, exhibits a unique sociocultural identity shaped by religious beliefs and anti-Western sentiments. The following sociological dimensions encapsulate the essence of Iranophiles social group in the Azerbaijani context (Table 8).

**Table 8**

*Sociological Dimensions Within the Iranophiles in Azerbaijan*

| Sociological Dimensions                                     | Characteristics Within Iranophiles   |
|---|--|
| Shiite Identity and Religious Education                     | Iranophiles are predominantly Shiites, emphasizing a shared religious identity that extends to their acceptance of religious education, often acquired in Iran   |
| Religious Leadership and Cultural Affiliation               | They accept the religious leader of Iran as their own, underlining a religious connection that goes beyond national borders, and living with Persian culture, Iranophiles manifest a cultural affiliation with Iran that transcends mere religious ties  |
| Acceptance of Iran's Approach and Geopolitical Orientations | Members of this group embrace Iran's approach in history, politics, and various fields, signifying a broader ideological alignment with Iranian perspectives, and expressing anti-American sentiments, along with Turkophobic and Europhobic views, Iranophiles demonstrate a distinct aversion to Western and certain regional influences                     |
| Sympathy for Russia and Non-Sharing of Russian Culture      | The primary reason for their sympathy for Russia lies in politics and rivalry with the West, showcasing a geopolitical alignment driven by anti-Western sentiments, while in contrast to other Russophile social groups, Iranophiles do not share Russian culture, emphasizing a selective appreciation for geopolitical reasons rather than cultural affinity |
| Opposition to Aliyev's Government                           | Iranophiles oppose the government of Aliyev, primarily due to its close relations with Israel, indicating a divergence in geopolitical alliances   |

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This sociological analysis unveils the intricate interplay of religious, cultural, and geopolitical factors that shape the identity of Iranophiles group in Azerbaijan. Their distinctive affiliations and geopolitical orientations contribute to a unique sociocultural identity within the broader context of Azerbaijani society. The situation of Iranophiles in Azerbaijan can be effectively understood through the lens of world-system theory, particularly its emphasis on geopolitical and cultural alignments within the global system. World-system theory, developed by sociologist Immanuel Wallerstein, examines the hierarchical relationships between core, semi-peripheral, and peripheral nations within the global economic and political structure (Chirot & Hall, 1982). In the context of Iranophiles, their religious commitment and cultural affiliation with Iran, despite residing in Azerbaijan, align with the concept of semi-peripheral nations within the world-system framework. Iran, as a regional power with a significant influence in the Middle East, occupies a semi-peripheral position in the global hierarchy. Iranophiles' religious and cultural connections to Iran contribute to their semi-peripheral identity, transcending national borders and reflecting a nuanced geopolitical alignment.

The sympathy expressed by Iranophiles towards Russia, driven by politics and rivalry with the West, resonates with world-system theory's insights into geopolitical dynamics. In the global system, alliances and oppositions are often shaped by geopolitical considerations, and Iranophiles' alignment with Russia can be seen as a strategic response to their anti-Western sentiments. Furthermore, the divergence in geopolitical alliances, as evidenced by Iranophiles' opposition to the government of Aliyev due to its close relations with Israel, aligns with world-system theory's examination of how geopolitical factors influence political stances within a global context.

In addition, the concept of Transnationalism, particularly in the context of religious identity and commitment, can offer valuable insights into the situation of Iranophiles in Azerbaijan. Transnationalism refers to the ways in which individuals and communities maintain connections, relationships, and affiliations that transcend national borders (Clavin, 2005). In the case of Iranophiles, the strong religious commitment to Shiism and the acceptance of religious education, often acquired in Iran, reflect a form of transnational religious identity. Transnational religious communities often maintain ties with religious institutions, leaders, and practices beyond the borders of their residing country (Tedeschi et al., 2022). Iranophiles, through their acceptance of the religious leader of Iran and their religious education acquired in Iran, exemplify a transnational religious orientation. This implies that their religious commitment extends beyond the national context of Azerbaijan and is influenced by religious practices and teachings originating in Iran. This perspective allows for an understanding of how religious commitments, in this case, Shiite Islam, can shape the identities and affiliations of individuals in ways that go beyond the confines of national borders.

Therefore, while world-system theory provides insights into the geopolitical aspects of Iranophiles' situation, the concept of Transnationalism offers a complementary perspective, focusing specifically on the transnational dimensions of their religious commitment and identity.

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## Discussion and Conclusion

The research findings can be discussed by being integrated with theoretical approaches. In this regard, Rogers Brubaker's theory of ethnicity, particularly outlined in his work *Ethnicity Without Groups* (2006), challenges the notion that ethnic groups are solid, stable entities. Instead, Brubaker suggests that ethnicity, much like race and nationhood, should be viewed as a fluid, dynamic process that arises through social and political contexts. He introduces the concept of "groupness," which refers to the contingent, context-dependent nature of group identity. According to Brubaker, ethnic identities and groups are often the product of political mobilization, and their formation is influenced by external events and circumstances, rather than being fixed and inherent. His theory emphasizes that ethnic groups are not pre-existing social entities but are constructed and reconstructed through ongoing processes of social interaction and political action.

Applying Brubaker's framework to the study of Russophile social groups in Azerbaijan, one could argue that these groups may not constitute a fixed, homogenous entity but rather reflect dynamic and context-dependent identities. The degree of Russophilia within these groups could fluctuate based on political, economic, and social circumstances. For instance, individuals or sub-groups within the broader Russophile community in Azerbaijan might express varying degrees of attachment to Russian culture, language, or political ideologies, depending on factors such as historical ties, geopolitical developments, or economic incentives. This theory allows for the possibility that Russophilia in Azerbaijan is not a static identity but could be activated or de-emphasized in response to external events. Thus, while Brubaker's theory does not directly explain Russophile groups, it offers a useful lens through which the fluid and constructed nature of these groups might be understood.

In Azerbaijan, various social groups exhibit Russophile tendencies, reflecting complex intersections of historical, cultural, and geopolitical factors. While these groups share certain commonalities, they also demonstrate distinct characteristics that shape their unique perspectives. A notable convergence among these social groups is the desire for warmer relations between Azerbaijan and Russia. Additionally, the interest in fostering Russian-speaking environments within Azerbaijan is a shared theme, reflecting a common appreciation for the Russian language and culture. Anti-American sentiments are evident in some groups, indicating a shared geopolitical orientation that leans away from Western influences.

However, within this overarching Russophile sentiment, significant differences emerge. Iranophiles, for instance, highlight a religious and cultural connection with Iran that transcends national borders. Their affinity for Iran's historical, political, and ideological perspectives sets them apart. In contrast, Dependents emphasize economic ties with Russia, underlining their financial dependence on external sources. Their primary concern lies in the appreciation of the Russian ruble and the impact of geopolitical events on their economic stability.

Nostalgists and Communists share a desire for the reconstruction of USSR communism, but their focus differs. Nostalgists center their Russophile sentiments on historical ties with the USSR, emphasizing linguistic identity rooted in Soviet-

era cultural practices. Communists, on the other hand, align with Marxist–Leninist ideology and share some cultural connection with Russia. Russian-educated social group exhibits a nuanced stance, partially accepting Russia’s approach, and maintains diverse geopolitical orientations. Ethnic Russians, with linguistic ties to Russian religious and cultural values, express an interest in fostering warmer relations.

The multifaceted nature of Russophile sentiments is evident in the diverse geopolitical alignments and perspectives within these groups. Iranophiles’ alignment with Iran is intertwined with anti-Israel sentiments, highlighting a unique geopolitical stance. Communists demonstrate a cosmopolitan orientation, embracing a global and inclusive perspective. Meanwhile, Russian-educated group encompasses individuals with varying geopolitical orientations, including both anti-American sentiments and Europhobic views.

The purpose of this study was to classify Russophile social groups based on the results of the interviews conducted. Prior to the research, there was no clear understanding of whether these social groups were homogenous or heterogeneous. The classification emerged as a direct outcome of the data analysis, and it was only through this process that the varying characteristics and motivations within these groups became evident. Thus, the differentiation of these groups was not a pre-existing hypothesis but rather a conclusion drawn from the qualitative insights gathered during the research. This approach highlights the exploratory nature of the study, as it sought to reveal the internal diversity or uniformity of pro-Russian sentiment in Azerbaijan through empirical findings.

In conclusion, while a shared Russophile sentiment prevails across these social groups in Azerbaijan, each group’s distinct characteristics, motivations, and geopolitical alignments contribute to a nuanced landscape. The interplay of historical legacies, cultural affinities, and economic dependencies shapes the complex tapestry of Russophile sentiments within Azerbaijani society. Understanding these nuances is essential for grasping the diverse perspectives that contribute to the overall geopolitical landscape of the region.

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ARTICLE

# Influence of Globalization on the Transformation of Kazakh Traditions and Culture: A Case Study of Southern Kazakhstan

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## ABSTRACT

This study aims to explore the complex evolution of Turkic cultural identities within the framework of Soviet ideology, emphasizing the impact of Marxist–Leninist principles on historiography and cultural policies. The authors analyze the views of scholars and the public on traditional and innovative culture in the context of globalization and digitalization. The study consists of an analysis of scientific literature and a public online survey. The issues of traditional and innovative culture hold a special place in modern developing society. A harmony between traditional and innovative culture, on the one hand, guarantees development and, on the other hand, preserves the most important time-honored values for society. This paper addresses this issue from the standpoint of a multinational society where the preservation of traditional norms is vital for preserving national identity. Ultimately, the study concludes that the traditional culture of southern Kazakhstan faces deterioration and therefore needs to be supported by state and public means.

## KEYWORDS

traditions, innovations, multinational society, sociocultural development

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## Introduction

In the modern world, globalization has significantly transformed cultural identities and traditions (Gabidullina & Sattarova, 2015). The continuous interaction between global trends and local customs in different regions presents both challenges and opportunities. The rapid modernization process driven by technological advancements, migration, and global cultural exchanges has resulted in the reconfiguration of traditional values (Ukolova, 2022). While globalization promotes international collaboration, economic growth, and social development, it also introduces external influences that may disrupt or overshadow local traditions and values (Bekbayeva et al., 2022; Zein et al., 2022).

One of the key issues faced by contemporary societies is balancing the preservation of traditional culture with the adoption of innovative practices (Gizatova & Ivanova, 2023). This is particularly crucial in Kazakhstan, where cultural identity is deeply intertwined with the history and collective memory of its people (Kokorina et al., 2023). The remnants of Soviet-era ideological suppression have had a lasting impact on how history, traditions, and ethnic identities are perceived and understood today (Butorov et al., 2022). Consequently, the modernization process often clashes with efforts to revive and protect cultural heritage (Volkova et al., 2024). One of the key factors shaping ideology is culture, which encompasses social behavior, institutions, and norms in human societies, along with the knowledge, convictions, art, laws, customs, abilities, and habits of people in these groups (Burova et al., 2023; Uralbaeva et al., 2023).

In this study, we seek to investigate the impact of globalization and modernization on the traditional and innovative values of southern Kazakhstan. The main research goal was to determine how global forces such as digitalization and Western cultural integration are reshaping the sociocultural fabric of Kazakh society. Nevertheless, it is important to admit that Kazakhstan's engagement with Western cultural elements does not imply a wholesale adoption of these norms but rather the selective incorporation of ideas and practices that complement Kazakhstan's unique cultural context. This process can enhance Kazakhstan's global participation while safeguarding its distinct cultural identity and foster a pluralistic cultural landscape where different traditions coexist and enrich the national identity.

To define the focus of the study, it is necessary to explore how Kazakhstan's cultural identity has been shaped historically. This study explores the transformation of traditional Kazakh culture under Soviet rule and in the modern globalized era. On the one hand, throughout the tenure of the Russian Empire and subsequently, within the Soviet Union, the Turkic peoples experienced a significant evolution in their cultural and historical discourse. The historiography of these peoples, influenced by the overarching Marxist–Leninist ideology of the Soviet era, underwent a stringent process of alignment with the state's official narratives. This rigid ideological control stifled the organic development of cultural identities. Deviations from the ideological canon, particularly those that could not be reconciled with Leninist principles, were systematically suppressed. Researchers exploring

such forbidden themes often faced persecution, underscoring the regime's efforts to mold historical scholarship according to its ideological imperatives (Iskakova et al., 2023).

This period saw the national cultures of the Turkic republics, both union and autonomous within the USSR, being developed within the confines of socialism. Any cultural expressions or phenomena that stray beyond socialist doctrine were dismissed as anachronistic, remnants of a nationalist and feudal past (Zavershinskiy & Koryushkin, 2022). The discipline of historiography during this time was tightly tethered to Marxist–Leninist ideology, further cementing the state's control over the narrative of history.

On the other hand, the collapse of the Soviet Union and the subsequent emergence of independent Kazakhstan introduced a new set of challenges. The advent of *perestroika* marked a pivotal shift, initiating widespread changes across the spectrum of social sciences and impacting collective consciousness. These reforms, which emerged during the *perestroika* period, were instrumental in preparing the groundwork for the eventual dissolution of the Soviet Union in 1991. This dissolution heralded the emergence of independent states, each embarking to rediscover and assert their unique historical narratives and cultural identities, previously imposed by Soviet ideology. The absence of a unified ideological framework has left a vacuum in which Kazakhstan's national identity is yet to fully assert itself in the face of global influences. This “ideological deficit” in modern Kazakhstan has led to confusion and uncertainty regarding the preservation of traditional values and the adoption of new, innovative practices. Unlike Soviet times, when there was a dominant guiding ideology—albeit restrictive—the current period was characterized by a lack of clear direction in cultural policy. This has led to a fragmentation of cultural identity, as external forces such as globalization and Westernization continue to permeate Kazakh society.

In the current age of ubiquitous globalization and modernization of all development processes, the priority of all states and societies is effective implementation and elaboration of genuinely open cultural policy geared toward reviving the national (ethnic) uplift for the people (Temerbayeva et al., 2023). Moreover, this revival needs to incorporate the critical elements of globalization and modernization (Aipova et al., 2023; Sinitsyn & Hentonen, 2023). Amid the burgeoning global trends of humanitarian dialog encompassing the entire civilization, Kazakhstan has to take its rightful place as an equal partner that knows its own culture (including the culture of other ethnic groups that are part of the unified Kazakh society) and maintains a constant dialog and exchange of cultural heritage (Mitrofanova et al., 2023; Osadchaya et al., 2023).

For example, in 2017, the First President of Kazakhstan Nursultan Nazarbayev launched the Rukhani Zhangyru program (Shekenov, 2017). This program was designed to accompany the country's broader political and economic modernization efforts by focusing on spiritual and cultural development. It emphasizes the importance of cultural heritage, intellectual growth, and the adaptation of traditions in the face of globalization. In this context, Kazakhstan's engagement

with the global community is seen as a way to enhance its cultural dialog while preserving its unique identity. However, despite the clear objectives of programs such as Rukhani Zhangyru, there remains a significant gap in understanding how effectively these initiatives are being implemented and whether they are achieving their intended outcomes.

The evolving attitudes of younger generations toward tradition and modernity need to be explored in greater detail. Younger Kazakh citizens are increasingly exposed to global cultures, which can sometimes conflict with their native traditions. It is crucial to study how these influences shape their values, behaviors, and sense of national identity, particularly in light of Kazakhstan's strategic goals of cultural preservation.

The relevance of this research is determined by two factors. The first factor is the recent wave of ethnographic publications that do not hold up to any criticism. The principles and objective of the Soviet system, which meant the absence of cultural ties to the “negative” outside world, a policy of endless dis-adaptation, and Russification and Sovietization, led the Kazakh people (like other peoples in the Soviet Union) to stray from its cultural and ethnic roots, the native language, ethnic mentality, and the foundations of Islam. The core of Kazakh culture has undergone numerous alterations (Smagulov et al., 2023).

The second factor shaping the relevance of our research is the inability of the government structure to properly forecast and comprehend the future. The national culture of a multinational state is the most prominent factor in social and political life and one of the components of the state's growth in all spheres.

Research into the roots and stages of development of the history, origins, and possibilities of Kazakh people and other peoples of Kazakhstan has recently gained significance. Interest in this topic initially had a substantial upswing in a period of certain ideological deficit, which emerged in the 10–15 years after the collapse of the Soviet system and remains to this day. The national traditions of the people have become a vital issue in the process of preserving cultural identity. After all, many rural and urban residents find spiritual support in these folk traditions, feeling their involvement in history and the principal sources.

The purpose of the present study is to analyze changes in the traditions and culture of Kazakhstan in the context of the modern world and the process of globalization.

## Literature Review

Various facts about Kazakhs and the Kazakh steppe were published in Russian literature and pressed back in the 18<sup>th</sup> century, starting from the academic encyclopaedia of 1768–1774. These publications particularly touched upon Kazakh culture and life in the second half of the 20<sup>th</sup> century. The accumulation of a significant body of materials about “the Kyrgyz” and “Kyrgyz steppes” (Alektorov, 1900/2013) led to the compilation of biographical and, in some respects, informative indicators on this topic. Efforts in this direction resulted in the first experience of ethnographic publications—*Ukazatel' Knig, Zhurnal'nykh i Gazetnykh Statei*

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*i Zametok o Kirgizakh (o Kazakhakh)* [Index of books, journal and newspaper articles and notes on the Kyrgyz (about Kazakhs)]—with extensive annotations by A. E. Alektorov (1900/2013).

It is highly important for every state that its historical culture is accompanied by modern traditions of the age of globalization (Barnett & Woods, 2021; Bekbayeva et al., 2022). However, the culture of the people has undergone transformations since time. These issues are among the topical problems raised in the writings and research of many scientists. In the conclusions drawn by different scholars, culture has different meanings. By the definition offered by E. B. Tylor (1882), culture is a complex unity that includes knowledge, beliefs, art, morality, law, traditions, and any other abilities and habits that a person acquires as a member of society. F. Boas, a representative of the modern approach, suggests that tradition is formed in culture as a response to specific historical conditions, which include cultural features from other cultures rather than corresponding to evolutionary periods (Moore, 2009).

In the first half of the 20<sup>th</sup> century, much of the debate about culture centered on the way of cultures' integration. The works of E. Durkheim and A. Radcliffe-Brown suggest that Brown's functionalism emerges and flourishes depending on the usefulness of the particular cultural form for achieving social integration (Calhoun, 2002). A theory put forward by E. Gellner (1994), a key representative of the modernist stance, states that contemporary societies need to be mobile, literate, and technologically mature to thrive. In turn, a states that contemporary state is the only structure able to shape the respective labor force through the system of mandatory public and standard education. Industrialization and modernization spread from the main hearth in the West, changing the traditional structures and cultures of many countries.

Differences in language, customs, and expressive behaviors are often the result of social orientation rather than inherent aspects. After Kazakhstan, as one of the developing states in Middle Asia, became a multinational state, traditional cultures experienced many changes. Currently, the intermingling of different cultures around the world is not a novel phenomenon. However, this phenomenon can lead to the destruction of the traditional culture of people.

Culture is common to a large group of people and is transmitted from generation to generation through ideas, attitudes, behaviors, customs, and traditions. Cultures, such as biological beings, change and compete for resources. H. Markus and A. Conner (2014) suggest that culture develops through a culture cycle: first, people create culture and then adapt to it themselves; second, culture affects people's ability to preserve itself.

The future of institutions and countries depends on the preservation and exchange of their cultural values and heritage. The most fundamental element is traditional values, as well as the norms, histories, and cultural ties that constitute them. In the formation of cultural ties, the process of communication, interaction, and exchange of information must be effective and understandable to all participants (Adam-Troian et al., 2021). A culture can be formed only through conversations and communication between people, which can occur in a social order, organization, or relationship (Hendrieth, 2018). This is especially pertinent to the present world and its dependence

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on the Internet. Cultural events and information exchange can have exceptionally strong influences on the youth (Hastings, 2018). The Internet Age is also referred to as the periodic information age (Chiulli, 2020), which can be attributed to the Internet, albeit not entirely. This is connected with the fact that digitalization is advancing in society every day.

Although cultures are stable in the short term (Pliskin et al., 1993), they are affected in the long term by such phenomena as international mass media, immigration, and technological and social models (Ford et al., 2003; Gallivan & Srite, 2005; Salehan et al., 2018; Slimbach, 2005). Thus, modern cultures entering Kazakhstan are realized through information technology, the Internet, and even people, particularly international students.

As described by R. Heilbroner (1994), the theory of technological determinism suggests that the technology of any society shapes the development of its cultural values, heritage, and social structure. In the age of digital technology, the role of family and educational institutions in education is more volatile and less visible since the role of teachers is no longer limited to their regular duties (Altinay et al., 2016; Grand-Clement et al., 2017).

Several studies, including those by N. N. Mabovula (2011), I. C. Nicu et al. (2020), and E. O. Wahab et al. (2012), confirmed the rapid erosion of culture and national identity. One solution to this problem involves the younger generation in the study of their cultural values and heritage (Spencer-Oatey, 2012). Cultural intelligence, which is described by B. Peterson (2010) as a skill used for work and communication in various cultural settings, has been recognized as a skill critical for work in the 21<sup>st</sup> century (Cultural Intelligence, 2015). E. Harvey (2019) focused on the erosion of cultural values and heritage from a climate change perspective, arguing that most debates on contemporary environmental issues are focused on physical consequences such as destruction caused by hurricanes, rising sea levels, higher insurance tariffs, and deteriorating agricultural conditions. At that, the immaterial consequences of climate change, including cultural consequences, remain outside of the discussion. Harvey (2019) further suggested that the loss of lifestyles and customs may diminish social cohesion and lead to general mental health problems in society. This conclusion stems from the fact that a person's way of life (i.e., culture) is closely connected with the person themselves and their place in society, and all of these factors are strongly associated with the place of residence and habitat. This implies that empirical research should focus on the transmission of cultural values and heritage from one generation to the next.

If a culture can be learned (Spencer-Oatey, 2012), then it can be taught, and one of the strategies for teaching and transmitting culture is conversation. Given that most contemporary students perceive information mainly from digital sources, it is important to integrate technology into the process of teaching to preserve cultural values and heritage through storytelling (Frank, 2024; Robin, 2008; Taylor & Parsons, 2011). Following the conclusion of L. Wittgenstein (2013) that language has a strong influence on culture, B. Benjamin (2006) asserts that storytellers create and support culture in every society. In this article, culture consists of various elements,

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such as language, religion, social practices, and ethical norms. While there is no singular definition of culture, this paper focuses on these elements, as they form the core of the traditional Kazakh way of life. Society must share and multiply its existing values to stabilize its political and economic power and strengthen its cultural values and heritage (Mariati, 2021).

Intellectual capital, employment opportunities, motivation for work and life, and opportunities for self-realization and development are essential both for the individual's happiness and for the country's global recognition. Dignity and respect, which are inherent in every person and guide society into the future, are the true mirrors of society. Therefore, every person living in a society should see the culture, traditions, and values of the country as part of their own well-being and recognize its historical, social, and cultural values to create a future with stable cultural values.

According to H. Spencer-Oatey (2012), we learn culture from the people we communicate with. For example, observations of adults interacting with children are a great way to observe the true symbolic transmission of culture between people. K. Ishii and C. Eisen (2016) add that cultural values and heritage are rooted in everyday practices, daily routines, communication styles, conversations about relationships, and social symbols with which people unwittingly and constantly interact. The transmission of cultural values, heritage, and standards from one generation to another through this process guarantees the continuity of customs in a group of people (Jegatheesan, 2019). A person learns culture (Spencer-Oatey, 2008, 2012), and culture, in turn, shapes the convictions, traditions, and values of the entire society (Jegatheesan, 2019). A study by P. Martins et al. (2022) suggested that cultural heritage is an effective means of the reconstruction and creation of value. Furthermore, R. N. Lawton et al. (2022) demonstrated how digital tools and the internet assist in the preservation of cultural values.

These conclusions suggest that the multifaceted views of scholars on ethnic identity reflect the complex nature of identity formation. From a social constructivist perspective, ethnic identity can be defined as the product of social, historical, and cultural processes. These perspectives contribute to a better understanding of the problems associated with the formation and discussion of ethnic identity in different social and cultural contexts.

## Methods

The collection of raw data was carried out through an online survey in the Kyzylorda, Turkestan, Zhambyl, Zhetysu, and Almaty regions, as well as the cities of Almaty and Shymkent, which make up the southern region of Kazakhstan. The survey was conducted using the Google Forms platform ( $n = 597$ ) in May and June 2023.

The study used a multistage stratified model with quota sampling to select control units. The sampling error with a 95% confidence interval does not exceed  $\pm 5\%$ . The resulting sample represented the adult population of Kazakhstan over 18 years of age by place of residence, administrative-territorial status of the settlement,

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sex, and age of the respondent. The survey included questions to assess dynamics in traditional Kazakh culture among the population of southern Kazakhstan in the context of globalization and personal self-determination in view of the sociocultural conditions of modern society and the economic significance of the system of family values, as well as to show the negative habits persisting in the nation's psychology. The data were analyzed by string coding to create headers.

The survey consisted of the following questions: “What are traditional values?”, “What is innovative value?”, “What specific factors influence the change in traditional values in society?”, “What innovations introduced into tradition do you consider necessary?”, “What do you believe was the reason behind the innovations that have been incorporated into this tradition?”, and “What do you expect the future of traditional culture to be like in the context of globalization?”. The respondents were offered several answer options.

In addition to primary data collection through an online survey, a comprehensive literature review was conducted to provide a theoretical foundation for the study. The literature review focused on identifying relevant academic sources that explore the transformation of cultural traditions and the impact of globalization on Kazakh society. We utilized several academic databases, including Scopus<sup>1</sup> and Web of Science<sup>2</sup>, to search for peer-reviewed articles, books, and reports that address these topics.

To conduct the literature search, we employed a strategic set of keywords and search terms, including “Kazakh traditions,” “cultural transformation in Kazakhstan,” “globalization and national identity.”

The search was limited to articles published in English and Russian, focusing primarily on studies published between 2000 and 2023 to capture both historical and contemporary perspectives. After screening the search results for relevance, we reviewed a total of 78 articles and 12 books, which formed the basis for the literature review section of this paper.

The literature review methods were also used to study various cultural policies, such as Kazakhstan's Rukhani Zhangyru program, and their impact on the preservation of national traditions and the integration of global cultural norms.

## Results

The results of our investigation indicate that the most popular approach in humanities education in Kazakhstan and globally is the positive approach to the potential and influence of cultural tradition on modernization processes. A systemic approach enabled us to examine innovations and traditions as a system whose elements are a single whole. Whatever factors are predominant, we concur with the opinion of Bogdanov that traditions play a “salvific” function that manages society's “existential

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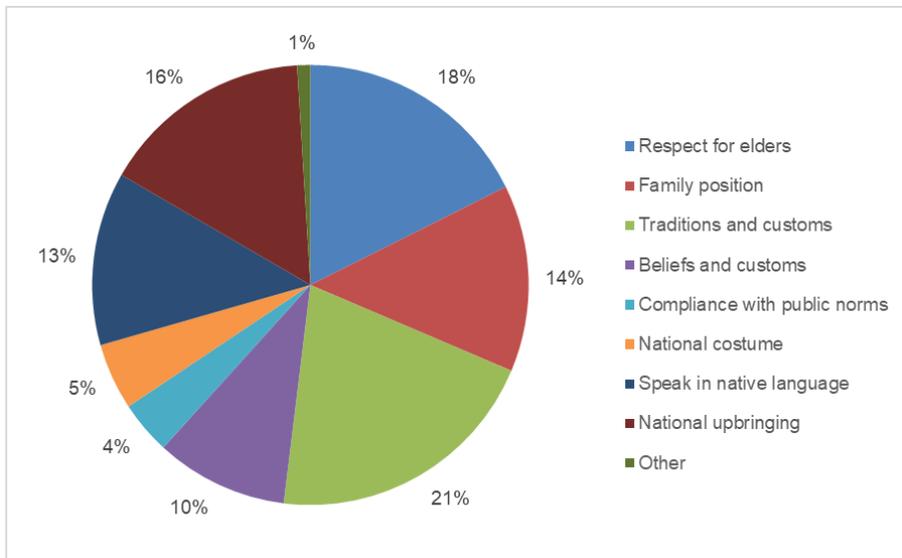
<sup>1</sup> SCOPUS® is a trademark of Elsevier BV, registered in the U.S. and other countries. <https://www.scopus.com>

<sup>2</sup> Web of Science® is a trademark of Clarivate Analytics LLC, registered in the U.S. and other countries. <https://www.webofscience.com>

anxiety,” which allows extracting from it the meaning needed to make daily life meaningful (Kazakhsko-russkie otnosheniia, 1964, p. 22). In the current age of globalization, we can observe that the traditional cultures of developing states are undergoing many changes. In particular, the Kazakh people have forgotten several traditions, which have been replaced by emerging innovative traditions.

In the course of the study, the features and significance of traditional and innovative traditions in contemporary society were identified. Research has demonstrated that traditional and innovative culture is experiencing partial changes. Figure 1 summarizes the respondents’ answers to the survey question concerning their understanding of traditional values.

**Figure 1**  
*Answers to the Survey Question “What Are Traditional Values?”*



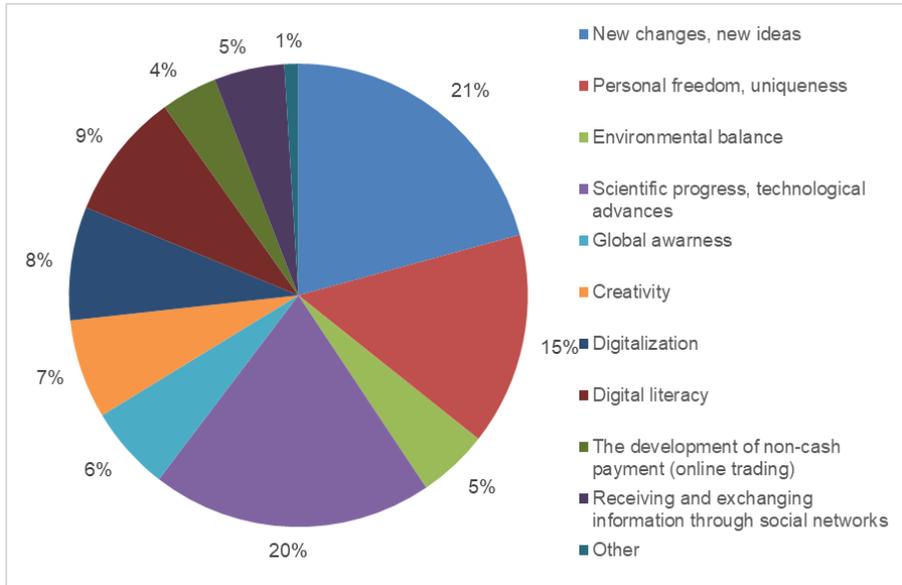
As shown in Figure 1, the majority of the respondents understood traditional values as traditions, respect for elders, and national upbringing, which may testify to the preservation of Kazakh traditions in southern regions.

Factors such as “family position” and “speaking in the native language” are noted by only 14% of the respondents. These answers show that residents of Kazakhstan attach more importance to the “traditional logic of life.”

Only 1% attempted to explain the meaning of a traditional value with definitions such as “the presence of a national idea” and “adaptation of principles inherent in the national tradition to the requirements of the time.”

The answers to the second question concerning the understanding of innovative value are summarized in Figure 2.

**Figure 2**  
*Answers to the Survey Question “What Is Innovative Value?”*



The concept of innovative value emerged relatively recently. All convictions, lifestyles, and family values undeniably undergo changes corresponding to modernity. The current period is a special time for innovation. Technological change is driving societal change at an accelerated pace. Digital information networks connect people, organizations, and nations in an unprecedented situation. As the opportunities to share ideas outside the organization and cross-fertilize innovative impulses increase, we must also focus on reviving something traditional.

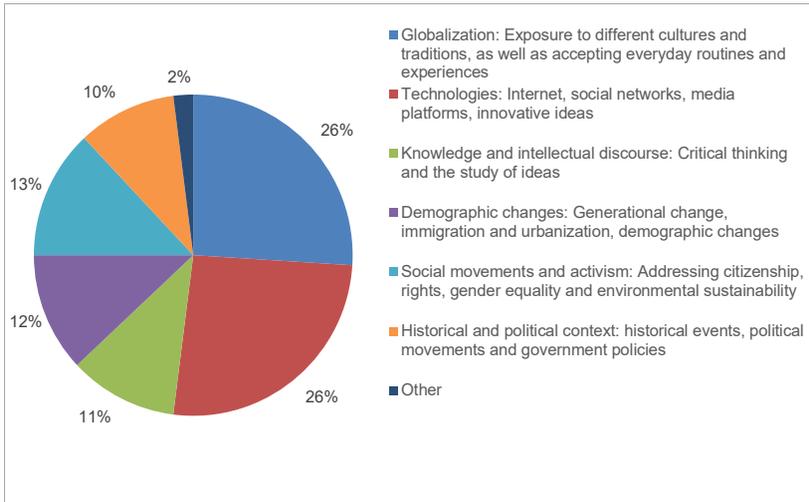
This opinion is corroborated by the respondents' answers. Our hypothesis that the majority of respondents would choose digitalization, digital literacy, and receiving and sharing information through social networks has not been confirmed. Some of the respondents understood improving their quality of life as an innovative value.

Currently, some directions of family cultural trends in Kazakhstan tend to imitate Western models. This weakens the national tastes of the younger generation and can gradually drive the nation away from the traditional culture of native peoples. This imitation has a negative impact on national culture, especially on the consciousness of youth, and diminishes the ethical and aesthetic value of national upbringing. The reasons behind this confusion are the underdevelopment of the differentiation of values in culture and the arts under the aegis of public interest; the lack of control by cultural groups and government organizations over the infiltration and distribution of foreign cultural products; and the alienation of public organizations and political parties from cultural development. In this context, in Kazakhstan, there is a great emphasis on the development of youth policy and the involvement of young people (Akimat of West-Kazakhstan region, n.d.).

For the final survey question, we asked the respondents to specify particular factors that affect changes in traditional and innovative values in society. The obtained responses are presented in Figure 3.

**Figure 3**

*Answers to the Survey Question “What Specific Factors Influence Changes in Traditional Values in Society?”*



The leading factors influencing changes in traditional and innovative societal values include “Technologies: Internet, social networks, media platforms, innovative ideas” and “Globalization: Exposure to different cultures and traditions, as well as accepting everyday routines and experiences,” which are chosen by 24%. Changes in innovative and traditional values are affected by the Internet and globalization. Globalization, the Internet, demographic change, and technological achievements are among the leading drivers of modernity, and these phenomena shape our future. Youths need to be ready to face these challenges and utilize the opportunities offered by the modern world (Aitymbetov & Nyshanbayev, 2021). The process of globalization and the crisis of values in the world call for a re-examination of the value upbringing and upbringing work with young people.

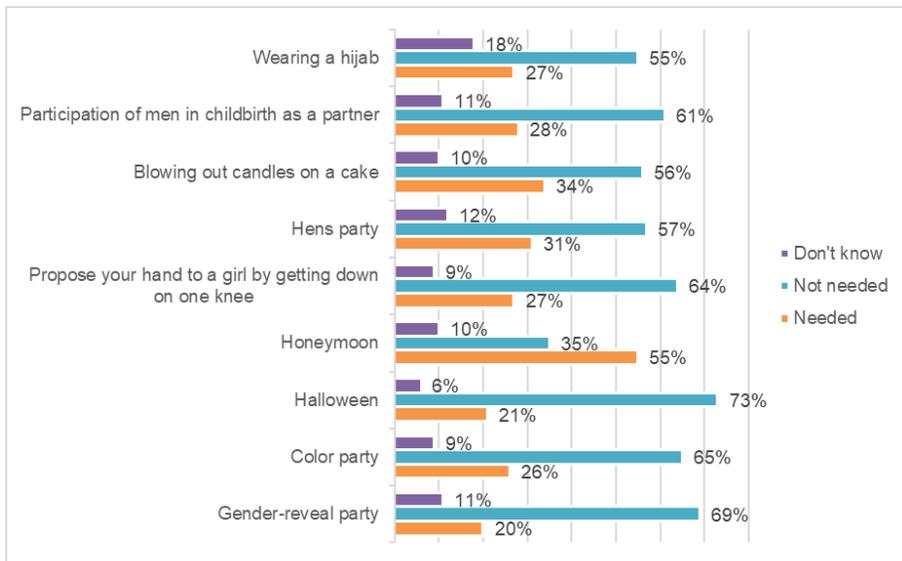
As Kazakhstan continues to modernize, these forces are shaping the cultural landscape, particularly among young people, who must be equipped to navigate and harness the opportunities of the digital age. For example, the Ministry of Digital Development is working to introduce new technologies into modern education in Kazakhstan in collaboration with the Ministry of Science and Higher Education. Currently, a large language model is being developed to advance cultural and linguistic heritage. As part of the project, a consortium has been formed, consisting of several educational organizations—the Institute of Information and Computational Technologies, Satbayev University, Nazarbayev University, the Sh. Shayakhmetov National Scientific and Practical Center “Til-Qazyna,” the A. Baitursynov Institute of

Linguistics, and KazNU (Digital Kazakhstan, 2024). The formation of a consortium of leading educational institutions to advance this project exemplifies the proactive approach needed to ensure that traditional values can evolve in harmony with technological advancements.

The widespread use of the Internet has brought screen culture to a new level, replacing the “cassette culture” with video cassettes, video recorders, and radio and bringing originality to the production, distribution, and consumption of spiritual values. It has changed attitudes toward various aspects of life, such as work, education, recreation, and creativity. Choice or consumption is decided by the will of the person. There emerges a special type of “home culture,” in which national and global ideas are mixed. The views of survey participants on the necessity of certain innovations in global culture are presented in Figure 4.

**Figure 4**

*Answers to the Survey Question “What Innovations Introduced Into Tradition Do You Consider Necessary?”*



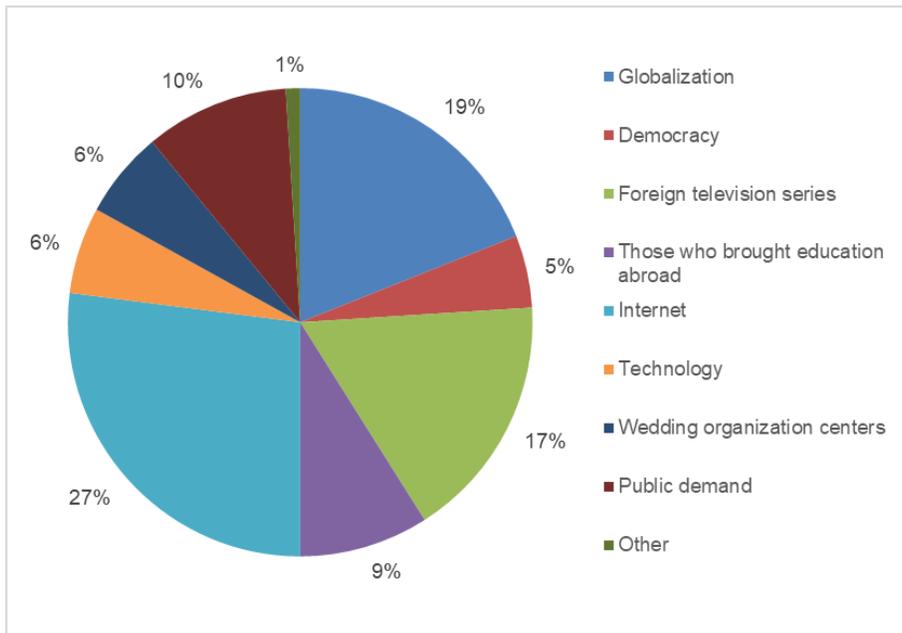
As part of the study, we asked the respondents to establish whether they find innovations incorporated into currently existing traditions necessary. The results show that, for example, the tradition of gender-reveal parties is considered unnecessary by 69% of the respondents, 20% believed that this innovation was necessary, and 11% had difficulty answering. Although this innovation corresponds to a tradition in Kazakh society which is called *abdyk toi* (Abdimaulen et al., 2022), it can be concluded that the residents of southern Kazakhstan generally do not support new traditions.

The relationship between tradition and novelty and clear harmonious communication between cultural worlds is a very complex process, and its implementation requires great investment. A return to tradition, a religious revival,

and an inventory of scattered values take place in the zone of active modernization and mass Westernization. National culture is the most well-established system, yet globalization is starting to pose risks to its development potential. In the present study, we also endeavored to identify the main factors that led to these innovations entering society (Figure 5).

**Figure 5**

*Answers to the Survey Question “What Do You Believe Was the Reason Behind the Innovations That Have Been Incorporated Into This Tradition?”*



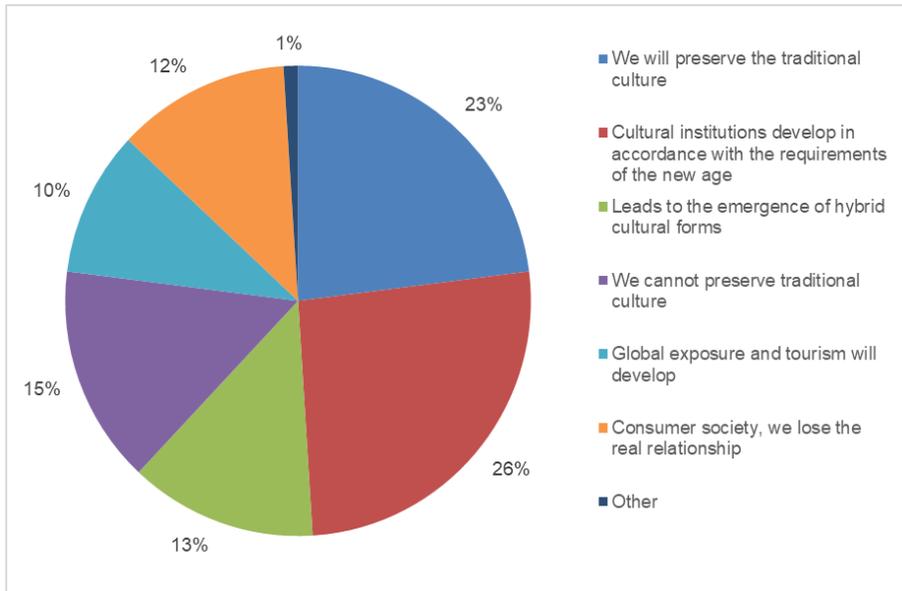
Twenty-seven percent believe the Internet to be the source of innovations that have entered tradition. This leads to the conclusion that the Internet has a significant influence on the distortion of traditions. At present, all states are adapting to the conditions of globalization. This means that on the path to mastering Western civilization, there is a risk of losing the unique history and culture of the nation. Western education, science, and technology are devoid of the nation of the much-needed traditional norms of upbringing and morality. The only way globalization can be safe for national identity is if each nation or state is able to adapt to the new reality.

In the process of globalization itself, increased attention must be given to national upbringing in Kazakh society, especially to ensure that the next generation continues to propagate tradition. Today, the world community is involved in a single system of universal cultural rules. This integration is unavoidable. It is only globalization, albeit with preservation of local national traditions and features, that allows choosing and extracting the necessary aspects from other cultures and thus shaping a uniform unique national cultural space that has its place in world culture. The future of national

culture and language is still obscure. The opinions of survey respondents on this matter are shown in Figure 6.

**Figure 6**

*Answers to the Survey Question “What Do You Expect the Future of Traditional Culture to Be Like in the Context of Globalization?”*



### Discussion

Russian philosopher S. A. Arutyunov (2023) argues that innovations, seen as a process that leads to the development of society, even those believed to be omnipotent, acquire an important role in societal development once they become traditions. Thus, traditions and innovations are equally necessary for cultural advancement. Prioritizing only one of the two results in the opposite effect. Cultural evolution and the cultural renewal of society depend on how well they fit together. Whether traditions and innovations are opposite or complementary to one another is a major question in the theory and practice of renewal. Nevertheless, the industry of culture ensures the survival of capitalism, creating the illusion of freedom and enabling control over the consciousness of individuals. The problem of the cultural industry has not yet lost its relevance. Western countries are once again seeing the cultural industry as a source of economic development. As noted by A. Nysanbayev (2004), the influence of the values of a liberal democratic society is growing in the sphere of culture and science. The traditional values and inherent cultural ideals of Kazakh people are under tremendous pressure, which is why their spiritual heritage needs to be preserved. However, national traditions also need to interact and cross-pollinate with the norms of Western culture. This implies a reevaluation of values and a revival of Kazakh

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culture for it to be competitive alongside Western culture. Amid dynamic globalization, a constructive dialog between the traditional values of Kazakh people and liberal-democratic values is critical. There is a need for laws to regulate the complex cultural relations of a transitional society and to secure the uniqueness and cultural identity of our people. T. K. Gabitov (2012) stresses the following:

Preserving national identity is one of the key problems in the face of globalization of the modern world. An open society and economy, the integration of cultures, and other ideas are the leading problems. In this respect, the preservation of national identity begins with protecting the components of citizens' inner lives: culture, language, religion, etc. As globalization becomes increasingly problematic, more attention is being given to national art, culture, language, and religion. There is growing interest in studying the origins of culture, linking its roots to national values. Thus, the most rational way to preserve national identity is the path of upbringing and education aimed at the development of national spirituality in the younger generation. (p. 212; Trans. by Makhpal Syzdykova, Zharkynbek Abikenov, Aigul Abdiramanova, Elmira Ilyassova)

As suggested by K. Zatov and N. Ismail (2016), present Kazakh society is faced with the problem of choosing its unique way of improvement that will also adequately meet the demands of globalization. In their view, Kazakhstan has all the prerequisites necessary to do so, and there is no doubt that in the 21<sup>st</sup> century, Kazakhstan will join the global cultural space as a civilization that has defined its form, interweaving many cultures within itself.

In the age of globalization, it is only natural for the culture of every person to undergo changes. There are cases where old traditions hinder the country's development. Nevertheless, the erasure of history is one of the central factors leading to the disappearance of national identity and the people as a group. For this reason, preserving the traditional culture of the people and passing it on from generation to generation is highly important.

## Conclusion

Our study reached several important conclusions and illuminated prospective directions for further research. First, we note a clear decrease in the popularity of traditional cultural values amid globalization. Our analysis suggests that digital storytelling may become an effective tool to protect, preserve, and transmit cultural heritage to the next generations. In this context, we argue for the importance of active participation in digital platforms and the development of collaborative projects on cultural heritage. Second, the study confirms that traditions and innovations play significant and interconnected roles in societal development. Their interaction should be interpreted as a mutually beneficial complementarity that facilitates comprehensive and sustainable development. We believe that it is vital to ensure that national cultural values are preserved and transmitted, although they should

also interact with and draw from the values of a liberal democratic society. To this end, relevant laws need to be created to regulate cultural relations and protect the inimitability and originality of culture.

A limitation of this study is that it does not offer a comparative analysis between Kazakh traditions and those of other ethnic groups within Kazakhstan. Focusing solely on Kazakh traditions without exploring the interplay with other ethnic cultures limits the study's ability to generalize the results. Future research could benefit from examining how modernization and globalization impact the cultural identities of different ethnic communities in the country.

Prospects for further research include the analysis of the impact of globalization on traditional cultural values, the development of digital storytelling tools for the protection of cultural heritage, the study of the interaction of traditional and innovative cultural processes, and the development of strategies to preserve national identity in the face of globalization.

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ARTICLE

# “I Am Not a Corrupt Criminal and What I Did Is Not Corruption!”: The Dynamics of Perceptions, Denial, and Understanding of What Corruption Is

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## ABSTRACT

While a general definition has been made on which acts are considered illegal corruption, people's understandings of what constitutes corruption behaviors are varied. The present research aims to understand the perceptions, interpretations, denials, and rationalizations of corruption by convicted perpetrators in Indonesia. How corruption is perceived and understood by perpetrators, and how these perceptions may be utilized as a basis for denying corruption accusations should be explored to have more understanding of the dynamics of corruption from the perspective of perpetrators. The data were obtained through in-depth interviews with five corruption convicts. The results show that the reasons the participants deny the accusation of corruption are as follows: (a) they know what corruption is and they believe what they do is not corruption; (b) corruption cases are political, so it is improper to call it corruption; (c) they consider themselves victims of a bad system;

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and (d) they think that everyone does it. Such understanding, then, is used as a tool for denial and rationalization. The findings indicate how corruption is perceived and understood can influence someone to commit corrupt acts.

#### **KEYWORDS**

perceived corruption, understanding of corruption, denial, rationalization perpetrator, explanatory case study

## **Introduction**

Several studies have shown the detrimental and destructive effects of corruption in many societies (Enste & Heldman, 2017; Lambsdorff, 2006; Myint, 2000; Rose, 2017; Rose-Ackerman, 2006). Such effects include inhibiting economic growth and investment, causing social and political conflicts, destroying social orders and norms, creating legal uncertainty, poverty, and injustice, reducing public trust in the government, and perpetuating immoral values in society. Surveys conducted by Transparency International in 2022 and 2023 revealed that Somalia has the lowest scores on the Corruption Perception Index, making it the most corrupt out of 180 countries in the world (Corruption Perception Index 2022, 2023; Corruption Perception Index 2023, 2024). Conflicts and wars are considered as the leading causes of corruption in Somalia, South Sudan, and Syria, and efforts to eradicate it have always failed (Tanno, 2020).

Contrary to these three countries, no war is happening in Indonesia, and conflicts are not as rife, though corruption is a serious problem. As an effort to overcome corruption, the Corruption Eradication Commission (*Komisi Pemberantasan Korupsi*, or KPK) was established by the government in 2004. The tasks of KPK, according to Indonesian Law No. 30 of 2002, include investigating, inquiring, and prosecuting criminals; acting to prevent corruption, and monitoring the implementation of state governance (*Komisi Pemberantasan Tindak Pidana Korupsi*, 2002). Many cases have been uncovered, and the perpetrators were arraigned in court.

However, although the KPK has functioned effectively in its duties and handled large numbers of cases in the past years, dealing with corruption is still a challenging matter in Indonesia. Interestingly, most convicted corruption offenders denied their wrongdoings and insisted that they did not commit corruption, even when caught in the act while doing the crime (*Koruptor cengar-cengir*, 2013). The present study raises this issue by interviewing individuals convicted of corruption offenses about their perceptions of corruption and the accusation of corruption.

### ***Discursive Psychology: A Lens on Corruption***

In this study, we employed an analytical lens through discursive psychology (McKinlay & McVittie, 2008; Potter, 2003), which examines how language and interactions construct and convey psychological phenomena such as thoughts,

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emotions, and identities. Within this framework, discourse refers to discussions or spoken topics that are both situated and action-oriented within a social context (van Dijk, 2000). The situated nature of discourse emphasizes that the way a topic is discussed is closely linked to its context, which is connected to a specific sequence of interactions (Potter & Edwards, 2001). Moreover, discourse is action-oriented, in which individuals communicate and share information in specific ways that are shaped by their understanding, social norms, and perceptions (Potter & Edwards, 2001).

In analyzing corruption cases, rather than asking whether particular actions constitute corrupt practices, discursive psychology focuses on how corrupt acts are justified, minimized, or denied, and how actions are categorized as corrupt (McVittie & Sambaraju, 2019). This approach can help reveal how social norms, power dynamics, and psychological states are constructed and negotiated within these contexts. Next, we present what corruption is and how a discourse about corruption is discussed.

### ***Corruption and How It Is Perceived***

Generally, according to the Asian Development Bank (ADB), corruption is any behavior on the part of the officials in the public or private sectors, in which they improperly and unlawfully enrich themselves and those close to them or induce others to do so, by misusing their position (OECD, 2008). This definition is similar to the World Bank's, which is "the abuse of public power for private benefits" (Helping countries combat corruption, 1997). In the context we presently study, in Indonesia, Law No. 31/1999, in conjunction with Law No. 20/2001, classifies the types of corruption acts explicitly derived from ADB and World Bank (Perubahan Atas Undang-Undang Nomor 31 Tahun, 1999; Tentang Pemberantasan Tindak Pidana Korupsi, 1999). There are seven corruption types deemed as criminal acts: (a) causing state financial losses, (b) bribery, (c) embezzlement in office, (d) extortion, (e) fraudulent acts, (f) conflict of interest in procurement, and (g) gratuities. These types of corruption are mostly related to state loss and state authority personnel. To the best of our knowledge, in the case of fraudulent acts, for example between private sector companies, it will be deemed as a criminal crime case beyond corruption law in Indonesia.

However, while there has been a definition by the ADB, the types of acts that are considered *illegal* corruption vary in every country. In fact, people's understandings of corrupt behaviors are also varied. A study conducted by Melgar et al. (2010) showed that corruption is interpreted differently according to society and culture which determine perception of corruption.

How a society defines corruption can also influence whether or not a person is deemed capable of committing it. According to social norms theory, factors such as societal tolerance for corruption might encourage individuals to engage in corrupt practices (Agerberg, 2022; Jackson & Köbis, 2018). This case supports the idea that corrupt behavior is a multifaceted socio-psychological phenomenon.

Moreover, among state leaders, managing corruption relies on how the discourse about corruption is framed or shaped. A comparative study (Kajsiu, 2018) regarding corruption discourse collected the speeches of Albanian prime minister,

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Edi Rama, and Columbian president, Juan Manuel Santos. The study found that there are three differences in the discourse of corruption: location, the victimization that corruption produces, and its definition. In Rama's discourse, corruption is found mainly within the public sector in general and the state in particular. The state is the principal perpetrator of corruption, while private companies and citizens are the primary victims, and corruption is exclusively defined as bribery. On the other hand, in Santos' discourse, corruption can be found both in the private and public sectors. The state is the victim of corruption conducted by the private sectors, and corruption is defined as cultural problems including bribery, state capture, clientelism, as well as cultural, moral, and ethical failures. The differences are influenced by the distinct anti-corruption and ideological contexts of each country. Public sector corruption is more prevalent in Albania compared to Columbia and awareness about the acts of corruption is built earlier in Albania than in Columbia, where armed conflicts still take place.

To the accused corruptors, the discourse surrounding corruption may revolve around whether they are guilty or innocent, as well as their defensive rhetoric. A study conducted in Jordan (Badarneh, 2020) has addressed this issue. The study focused on public statements of apology, analyzing the responses by (a) Basem Awadallah, a former Royal Court Chief and Minister of Planning, and (b) the Office of the Queen of Jordan, who were accused of corrupt practices involving public funds and excessive spending on luxury items, respectively. The study revealed that the apologies typically involved the denial of the corruption allegations, with both parties employing similar strategies, such as invoking the sociocultural context of Jordanians and promoting nationalistic sentiments. In summary, Awadallah's apology portrayed himself as a victim, suggesting that the public was not well-acquainted with him, while positioning himself as a devout and patriotic public servant. Conversely, the Queen's office questioned the validity of the accusations and the motives of the accusers, portraying them as wrongdoers. Thus, the primary aim of these apologies was to safeguard one's reputation.

Undoubtedly, the persistent denial of wrongdoing by offenders poses a challenge in uncovering and combating corruption. A study by Anand et al. (2004) highlighted one of the most intriguing findings in white-collar crime literature: offenders often fail to recognize their actions as corrupt. They justify their behavior by arguing that their actions are standard practices within their profession or position. Moreover, Abidin and Prathama Siwadi (2015) discovered that in Indonesia, out of 100 suspects in alleged corruption cases, only 3% admitted guilt as determined by a court; the remaining 97% denied the charges and vehemently asserted their innocence. Those who denied the accusations of corruption often claimed that the prosecutors' demands and the court's decisions were erroneous and lacked factual basis. Some even portrayed themselves as victims or scapegoats of their superiors.

We have demonstrated above that individuals hold varied understandings and perspectives regarding what constitutes corrupt behavior. Denials of wrongdoing in cases of corruption are frequently observed among those accused, including state leaders who have been found guilty of corruption, such as Jacob Zuma, Najib Razak,

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and Benjamin Netanyahu (Bachner, 2021; Latif & Chu, 2021; S. Africa's ex-president, 2021). However, to our knowledge, little research has been conducted on how corruption is perceived and understood by perpetrators, and how these perceptions may be utilized as a basis for denying corruption accusations.

In terms of Indonesian context, psychological research on corruption has explored aspects such as mental health and spirituality (Sahama et al., 2019), motives and psychological dynamics among convicts (Restya & Amalia, 2019; Salama, 2014), social value orientation (Mulyana et al., 2019), and religiosity (Fachrunisa & Chizanah, 2021; Syamsudin et al., 2022). However, studies on how corrupt actors perceive and understand corruption are still limited, highlighting a crucial gap for developing effective anti-corruption strategies.

### ***Denial of Committing Corruption***

From a psychological perspective, denial is defined as a unique defense mechanism against external threats (Gago-Rodríguez et al., 2018; Ritchie, 2014), including court punishment, social sanctions, and guilt. Several studies have examined the role of denial after corruption (Ashforth & Anand, 2003; De Klerk, 2017; Gannett & Rector, 2015; Mulder & van Dijk, 2020; Nahartyo & Haryono, 2018; Rabl & Kühlmann, 2009). The results showed that perpetrators were convinced that they were honest, and that the act could be legally and morally justified. Denial is almost common in corruption cases, and this kind of defense mechanism is a common thing that occurs when an accused is found guilty. Such a phenomenon is possible when the accused corruption offenders are eager to appear as a moral person (van Prooijen & van Lange, 2016), even after committing an immoral or unethical action.

Moreover, according to Moore (2016), there is a phenomenon of self-deception in unethical behavior, including corruption. This works through a biased cognitive process, whereby a person assesses themselves as a hero contributing to society. Moore emphasizes three strategies in deceiving oneself to still be moral after committing a crime. These strategies include motivated attention (selectively attending to or ignoring information), motivated construal (redefining one's immoral actions to make them justifiable), and motivated recall (selectively forgetting, remembering, or inventing information).

A meta-analysis of six studies conducted by Dupuy and Neset (2018, p. 5) found that individuals would commit crimes when they anticipate indirect harm or work in organizations that do not punish unscrupulous behavior. A similar finding was also reported by Cabelkova (2001) regarding the role of corruption perceptions in motivating individuals to commit corruption. According to the study, when participants perceive that the employees who work in an institution are corrupt, they will give bribes in order to be facilitated in managing business licensing at that institution. Usually, when accused of bribery, they deny it, claiming that such a thing is common practice in certain institutions. Thus, the denial of committing corruption may appear as ignorance of unethical practices by the organization or institution where corruption is conducted, while the people involved normalize it over time. We will explore this issue further in the present study.

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### ***The Present Study***

Since the establishment of the KPK in 2004, many politicians, public officials, civil servants, private parties (entrepreneurs), state-owned enterprises (SOEs) officials, and those assisting perpetrators have been prosecuted. Since 2014, KPK has reported that the top four corruption offenders are dominated by people from the private sector (entrepreneurs), members of the People's Representative Council (DPR/DPRD), Echelon I–III government officials, and regional heads (governors, regents, and mayors). The top offenses are bribery, procurement of goods/services, misuse of funds, money laundering, illegal/unauthorized fees collection, and inappropriate license granting (Pusparsa, 2021).

The public has appreciated the KPK's existence and achievements in increasing Indonesia's Corruption Perceptions Index (CPI) score. Since 2009, Indonesia's CPI score has increased yearly. It has increased by 20 points within 14 years, from 20 in 2004 to 34 in 2023 (Transparency International Indonesia, 2024). Despite these achievements, politicians, public officials, and business people still commit corruption. In Indonesia, the number of corruption cases is still relatively high while the prosecution of corruption cases by law enforcement agencies tends to decline from 2015 to 2020 (Alamsyah, 2021). It will probably continue to get higher since the KPK's authority was weakened by Law No. 19/2019, which reduced the duties and powers of the KPK, raising concerns of increased corruption cases and decreased CPI score (Afifa, 2020). Most of the offenders, however, denied the accusation of committing corruption. Most accused corruptors in some notorious cases in Indonesia have argued that they were not guilty (Anas Urbaningrum *divonis*, 2014; Ihsanudin, 2015; Pratomo, 2014).

This study, by utilizing discursive psychology (Potter, 2003), investigates the perceptions of corruption perpetrators and the dynamics between their perceptions and the defense mechanisms they employ regarding their corrupt behaviors. We argue that perception is a crucial factor in understanding behavior; therefore, examining the perception of corrupt behavior from the perspective of the accused is essential to explaining the underlying mental processes.

There are three main points to address: (a) How do perpetrators perceive their corrupt acts, and why might they minimize, justify, or deny the accusations? (b) How do they construct their position and the nature of the corrupt acts—do they position themselves as victims, blame others, or shift focus away from themselves? (c) How do their perceptions influence the defense mechanisms they employ in response to their corruption cases—do they shape perceptions of guilt or innocence to seek justice, or do they call for accountability regarding the accusations?

### **Method**

The participants were five convicts serving their sentences in Sukamiskin Penitentiary, a special prison for corruption convicts in Indonesia, located in Bandung, West Java. Before the interviews, we obtained permission from the Head of the Regional Office of the Ministry of Law and Human Rights of West Java to conduct research at Sukamiskin. After receiving permission, we visited the facility to request interviews with the targeted participants for inclusion in this study.

Prior to the interview, each participant agreed to the informed consent verbally stated by the interviewers, affirming their voluntary participation. They were also informed that the interview was conducted solely for academic purposes. Participants were assured that they could withdraw at any time without penalty, that confidentiality would be maintained, and that the interview would be recorded. Moreover, they were informed that these interviews would be made public without disclosing their identities, and there would be no rewards for their participation. However, before collecting data, we did not apply for ethical clearance, as the local context did not require such oversight for us to conduct the research. Accordingly, permission from the Head of the Regional Office of the Ministry of Law and Human Rights of West Java is sufficient to allow us to collect the data.

Five participants were chosen to represent the professions that are most commonly associated with corruption in Indonesia (Table 1). All participants were males aged between 40 and 50 years old. The participants were charged with bribery, receiving gratuities, and embezzlement. The court has convicted them, fined them, and sentenced them to prison for 3–10 years. The background data of the participants were acquired from the prison officers on duty the day of the interview.

**Table 1**  
*Code Names, Professions, and the Participant's Case*

| Participant's code name | Participant's profession before conviction              |
|-------------------------|---|
| S-1                     | Head of Regional People's Representative Council (DPRD) |
| S-2                     | Regional Head   |
| S-3                     | Civil servant   |
| S-4                     | Former head of a State-Owned Enterprise                 |
| S-5                     | Entrepreneur  |

Data were collected in the form of in-depth interviews in July, 2017. Interviews were conducted individually by three interviewers in one of the rooms at the prison. Two interviewers were researchers of this study, while the other one was our colleague who was not involved in the present study. The interview lasted one to two hours per session and was recorded on a digital tape recorder and then transcribed verbatim. Each interview lasted about 50–70 minutes. All names have been replaced by aliases; identifying information has been changed. To protect the confidentiality of participants, the names of their organizations have been deleted. We developed a set of questions in Indonesian language, which was then deeply explored during the interviews. The interview consisted of four main questions, namely:

1. In your opinion, what is the definition of corruption?
2. You have been found guilty by a court of corruption. In your opinion, is the verdict correct or not? Have you really done what the prosecutor accused you of and what the judge decided in court?
3. What was your role in the case?
4. In that particular case, who do you think is the guiltiest and the most responsible for the act (of the crime)?

The results were transcribed and analyzed using thematic analysis (Braun & Clarke, 2006). Thus, the data were analyzed using inductive analysis that primarily used detailed readings of raw data to derive concepts, themes, or a model through interpretations made from the raw data by the researcher. The raw transcripts were read several times by the researchers to reach familiarity and understanding of its contents in order to identify themes and categories. The researchers discussed the readings and developed a coding frame manually using a word processor. The coding was performed to form categories, which were then conceptualized into themes after several discussions.

## Results

Four main themes related to corruption perceptions from the point of view of the accused were identified. The first theme is “The expert’: they know what corruption is”, focusing on what they believe as the concept of corruption. The second theme, “The case of corruption is political, not precisely corruption as it is” conveys what they think of what they actually did regarding the accused acts of corruption. The third theme, “The victims of a bad system/environment,” discusses how they blame the system for making the public label them as corruptors. Finally, the theme “Inclusive perpetratorhood: everyone is doing it” emphasizes that what they did is what people around them normally do. Next, we present each of the four main themes separately in detail.

### ***“The Experts”: They Know What Corruption Is***

When they were asked what constitutes corruption, all the participants believed that what they did was not a corrupt act. They claimed that they knew what corruption was, which was different from what they actually did in their cases. Of the five participants, in general, four had identical responses in defining corruption. They argued that corruption was an act that was detrimental to the state, related to the state’s financial loss, and committed for a particular, mostly personal, interest.

S-1: The definition of detrimental to the state, for example, is marking up budgeting, and giving/receiving something to get permission, as compensation. (Trans. by Zainal Abidin, Idhamsyah Eka Putra, Yuliana Hanami, Sari Angraeni—Z. A., I. E. P., Y. H., & S. A.)

S-2: Corruption is indeed detrimental to the state ... (Trans. by Z. A., I. E. P., Y. H., & S. A.)

S-3: The detriment to the state means that the rights of state property are taken, so it is very detrimental to the state ... and the perpetrators have the authority to use the state assets ... (Trans. by Z. A., I. E. P., Y. H., & S. A.)

S-5: Definition of corruption is not clear, its meaning is still gray ... as far as I know, corruption is detrimental to the state. For example, abuse of the state budget, abuse of office, benefiting oneself and others. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Concomitantly, participant S-4 did not state implicitly regarding the state loss due to corruption. However, as to what participant S-5 emphasized, S-4 also mentioned that the definition of corruption was not clear. He gave examples of this ambiguity

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where bribery was a clear example of a corrupt act, while the boundaries of money laundering could lead to multiple interpretations.

S-4: Corruption itself is not clear. Bribery is clear because there are intentions for certain interests, but money laundering has no clear boundaries, so it has multiple interpretations ... (Trans. by Z. A., I. E. P., Y. H., & S. A.)

In line with S-4, S-2 also mentioned bribery when he gave an example of a form of corruption.

S-2: The definition of bribery is, for example, the police arrests car or motorcycle drivers who violate the traffic. Then, the driver gives a bribe to the police in order not to be ticketed. Corruption should have an intention ... (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Thus, they acknowledged that bribery is a kind of corrupt act involving the intention of the doers. In other words, they admitted it as something intended for a specific purpose that benefits the bribe giver.

Participant S-5 also argued that his bribery of local state officials was not considered corruption. As far as he knew, corruption involved big money, as in, more than 1 billion rupiahs. Hence, as a businessman, he believed that the process of passing a project connected to the government's interference was closely related to the game of bribery. He considered that bribery, notably in a small amount of money, was not corruption.

S-5: As far as I know, it is called corruption if the amount of money given or received by the perpetrator is above one billion rupiah ... The amount of money I gave was only 100 million rupiah, not up to one billion. So, it's not corruption ... and there's no need to be convicted of bribery. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

In fact, KPK only handles corruption cases that cost the state more than one billion rupiahs. However, if the case involves state officials, the KPK can handle cases of bribery of under one billion, even 10 million (Rastika, 2013).

The responses given suggest that the participants indeed acknowledge that corruption is a detrimental act carried out on the basis of personal interests. However, they have their own understanding of what might be called "wrong corruption." Moreover, they had a more sophisticated understanding of how corruption manifested itself in the field. Due to this understanding, they believed that what they did was clearly different from the stated definition.

This led to another interesting finding about their perception of corruption. Participants distinguished between corruption and gratification in that they believed that gratification was not necessarily an act of corruption.

S-1: However, in the case when people give and are given, that is not corruption. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

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S-2: However, (the definition of) gratification is still debatable and not easy to prove, and it has a cultural basis. In our culture, giving and receiving (gifts) is a habit, different from the individualistic European culture. Therefore, an invitation to eat together and giving gifts is normal. Giving parcels or money is not just a bribe or gratuity, but an expression of pleasure. Corruption should have an intention, which I lack. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

They mentioned gratification in this context because, for them, the concept of gratification is not clearly defined, especially if it is related to the context of Indonesian or Eastern culture. Moreover, they believed that gift-giving and receiving is a cultural practice that is part of the tradition of Indonesian society, as an expression of gratitude or even to celebrate religious events. Giving gifts is a common tradition that has taken root in Indonesia's community life (Nazifah, 2019). Even the results of a Groupon survey conducted in 2013 showed that many Indonesians (40%) wanted to spend their money to buy gifts for their closest people (Anna, 2013). Referring to this, accused corruptors used the excuse that this tradition is part of Indonesian culture, which is still valid today.

S-4: Culture. Give gifts to relatives; send a parcel before Eid. There is research on this, corruption in East Asia. Giving gifts by law is classified as gratification because it is associated with position. That is not true ... then, it must be clarified what gratification is ... (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Even though participant S-4 stated that gratification was not linked to position, Nazifah (2019) confirms that even the smallest gift to civil officials or state administrators, if it is related to their position and goes against their commitments or duties, it can be regarded as bribery. Giving gifts, or giving something as a token of gratitude, is indeed a common thing and part of Indonesian culture. However, there is a regulation that bans giving gifts to government officials, as stated in Law no. 20/2001, article 12B (Perubahan Atas Undang-Undang Nomor 31 Tahun 1999, 2001). In the explanation of the article, gratification is defined as a gift in a broad sense, which includes the provision of money, goods, rebates, commissions, interest-free loans, travel tickets, lodging facilities, travel tourism, free medical treatment, and other facilities; which are received domestically and abroad and carried out with or without electronic means.

S-1: Entrepreneurs give their money after the local regulation is passed and the project is running, as a thank you. Maybe they made a profit from the project, and then want to say thank you. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Despite the definition of gratification being clearly described, the participants seemed to ignore what is stated in the law. Nazifah (2019) also confirms that the lack of understanding and intention from civil servants in addressing gratification as ruled by the law is one of the reasons why gratification practices are still prevalent today. As a result, they saw that their actions could not be interpreted as corruption that harm

others, but purely as a part of the gift-giving and receiving custom. Therefore, they did not acknowledge what they did as a “crime,” even though their actions were proven to be bribery and gratification.

***The Case of Corruption Is Political, Not Precisely Corruption as It Is***

We found that all participants acknowledged that if what they had done was considered corruption, they defended themselves by saying that everything happened because of political interests. Thus, they argued that the corruption in their cases was not relevant to the true definition of corruption as they understood it, such as harming the state and something done with certain intention that benefits oneself. The statements from S-1 described such examples:

S-1: Crime, including corruption, should have an intention, proven in court. However, my case is different from politicians who may have intentions, but not necessarily in the bureaucracy. Politicians grow the organization by their members’ income. There is no such obligation in government agencies. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

S-1: receive gifts from entrepreneurs, after the local regulations are issued and the project is completed, so it’s not corruption, because it doesn’t harm the state. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Participants considered that they were accused because political opponents, law enforcers, and their superiors at work disliked them. As a result, they felt that they became the victims of these parties. Therefore, the reason that they went to prison was not solely because of their own actions.

S-4: My case was political because my president [managing director] did not like me, then reported that I was involved in a criminal case, even though this was a civil issue. In case I am wrong, the Internal Control System is sufficient to handle it. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

The intervention of law enforcement officers, as well as the case intersecting with them, led participant S-2 to believe that his case had been manipulated. In the incident involving S-2, issues arose when the officers felt slandered by him. This led him to believe that he was being punished as a result.

S-2: You may not have committed corruption, but because law enforcers manipulated it, you become a convict. For example, my case was ... also manipulated. I will never want to be corrupt. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Regardless of what the participants claimed, corruption cases in Indonesia cannot be separated from political matters. This is supported by Syarif and Faisal (2019), who found that one of the main roots of corruption in Indonesia is a corrupt political system. Looking at the participants’ cases, it is impossible to ignore the fact that their cases

are highly political since it involves the public and private sectors, which are related to political decision-making. Hence, this description falls into the category of political corruption. According to Amundsen (1999), political corruption occurs at the top level of the state and has political repercussions.

### ***The Victims of a Bad System/Environment***

There was a statement by the participants saying that they were in prison right now because they were trapped in a bad system and work environment. They mentioned external factors as a “system,” considered to be conditions influencing individual behavior in the workplace. These conditions were perceived to harm their characters (especially to be corrupt) but could not be avoided and controlled.

One participant emphasized that the intervention of law enforcement in handling cases, especially if they already had certain sentiments towards the perpetrators, could make the case even worse.

S-2: The current system is indeed a corrupt one and even worse than ever. In such a system, it is possible to enforce laws based on like and dislike, and manipulation. Many people know that I am a victim of such law enforcement system. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Regardless of what participant S-2 said, the role of law enforcements in corruption cases in Indonesia is quite a concern. The number of corruptions continues to rise, due to reasons such as law enforcement officials' lack of awareness of their tasks and obligations, the apparatus' lack of morals, and the lack of functioning supervisory institutions (Suramin, 2021).

Another participant, who came from the private sector (entrepreneur) stated that he was trapped by the officials.

S-5: The system is broken, and it seems bad to a private actor in the government. There are many requests from officials when dealing with government projects, which should not be there in a clear system. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

The government plays a system by setting various requests that must be fulfilled. This case happened to participant S-5. Many businessmen in Indonesia appear to be willing to pay bribes to public authorities to get things done faster because it is known to be a regular practice in the country, and anyone who does not do so is likely to lose business (Kuncoro, 2006).

Additionally, two participants stated that their relationship with their co-workers influenced the reasons for their arrest. For participant S-3, his relationship with his superior was just a matter of following orders:

S-3: It could be due to friendship with the leader, which makes a person comply. ... it is not easy to refuse a superior's request and commit an offense. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

Concurrently, participant S-1 felt that he had been betrayed by his co-workers:

S-1: I was reported by the council of members themselves. He admitted to receiving a check, which was reported to the KPK as evidence ... (Trans. by Z. A., I. E. P., Y. H., & S. A.)

If we look at the responses above, it seems that the participants blamed their relations with their co-workers. They were reluctant to assume that their fault was solely due to their own actions, given that their co-workers had contributed to their involvement in the cases.

Corruption can be caused by bad-character officials who are motivated by excesses, opportunities, and excessive needs, but it can also be caused by a bad legal system (Iskandar & Hernawan, 2017). Taken together, the participants perceived themselves as slandered victims. They insisted the mistakes occurred because of the poor system implementation and the work environment that forced them to do so.

### ***Inclusive Perpetratorhood: Everyone Is Doing It***

Until now, many perpetrators of corruption in Indonesia have been caught and their cases have been sentenced. As corruption is a common case that is known to the public, it is obvious the perpetrators already know about various actions that are categorized as corruption. Two participants wondered about their case, and if everyone also did it, why only their acts were considered wrong:

S-1: All my friends in parliament often receive envelopes from investors and businessmen who secure projects here (in District X). So, that's considered a normal occurrence. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

S-5: It's not just me who bribe public officials ... all businessmen like me who get projects from the government do the same thing. (Trans. by Z. A., I. E. P., Y. H., & S. A.)

This indicated that they were most likely well-informed that many others were doing the same thing but not being caught. This could also show that, in fact, many perpetrators of corruption were still on the loose, regardless of whether the authorities knew about it or not. As of 2013, it was reported that many corruptors in Indonesia were not seriously punished, and even among those who work as businessmen, their businesses were still running (Dozens of corruptors still in limbo, 2013).

## **Discussion**

The findings of the present study indicate that even though the perpetrators acknowledged corruption as a crime detrimental to the state, they did not think that their actions could be categorized as corruption, and claimed their cases were the result of criminalization by those who had vested interests.

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Based on language perspective, the ambiguous perception of corruption can be understood because the term can be seen in two ways: describing an event or action objectively (descriptive function), and evaluating something subjectively (evaluative function). In other words, the term "corruption" contains descriptive and normative elements, related to one's moral integrity (Heywood & Rose, 2015; Rose, 2018). Perpetrators may use it relative to their own arguments and circumstances, perceiving and defining it to their own advantage, so that their cases would not be categorized as criminal acts. It is then understandable why many accused of corruption deny the accusation (Ashforth & Anand, 2003; De Klerk, 2017; Gannett & Rector, 2015; Mulder & van Dijk, 2020; Nahartyo & Haryono, 2018; Rabl & Kühlmann, 2009).

Our study also reveals that the perpetrators have their own understanding of what is called corruption. Based on the interviews, they compared various pieces of evidence to show how corrupt behaviors generally differs from what they did. What was maintained by the perpetrators denoted an act of self-defense to drop the accusation that they were guilty. They built the definition of their behaviors and were adamant in their stance by ignoring the fact that what they have done actually constitutes corruption. Defending and denying oneself of committing acts of corruption are common things to do in corruption cases. According to Anand et al. (2004) people convicted of white-collar crimes tend to admit their wrongful behavior but deny criminal intent and their stigmatization as criminals by employing some rationalization techniques which allow them to view their corrupt actions in such a way that it appears to be normal and acceptable manners.

In conjunction with defensive arguments, our study shows that the perception of corruption is constructed through a process of selectively choosing information to justify the act. Consequently, perpetrators come to the conclusion that they do not deserve sanctions, whether legal or social. Some interviewees argued that receiving rewards or gratuities was a common practice and not against the law. They contended that it was widely practiced across all levels of bureaucracy and considered culturally acceptable in Indonesia (Nazifah, 2019). Accordingly, based on their interpretations, they believed the law's definition of gratification was inaccurate because it contradicted the standard practice of gift-giving tradition.

The ambiguous definition of gratification, according to the participants, highlighted the fact that they believed what they did was not against the law. This indicates that they position themselves as the implementers of a long-standing cultural tradition that has been practiced in Indonesia. They argued that the law's unclear definition of gratification fails to take cultural aspects into account. They believed that the law should not contradict prevailing cultural practices and that what they did would be considered legal. This idea made the participants believe that their acts were unrelated to corruption. Even so, in the case of the participant S-5, who is an entrepreneur, it was clear that he deserved to be punished because the bribery case involved government officials. In other words, his defense was not acceptable. In Indonesia, it is stated that gratification by entrepreneurs can be criminalized only if it involves officials (Clifford Chance, 2019). However, based on interviews, S-5

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claimed that many businessmen had done the same thing, that is, bribing officials. In other words, they observed and imitated individuals who engaged in corrupt acts without facing any punishment, as it was perceived as a common practice. To date, the case of bribery committed by businessmen to state officials is still rampant in Indonesia (Nuralam, 2021). Likewise, this finding strengthened a study conducted by Cabelkova (2001), which showed that when the employees of an institution are mostly considered corrupt, it can lead to a culture of corruption. In our study, the case includes entrepreneurs and, very likely, politicians.

Additionally, regardless of the cultural context, accepting gifts can create a conflict of interest and reduce the officials' integrity, which is an entry point to scandals and corruption (Kjellberg, 1994). This condition does not only occur in Indonesia. In several countries, the scope of gratification has flexible rules that take into account certain requirements. In some Middle East countries, for example, gifts or entertainment for non-incitement recipients to breach their duties should not be considered bribes (Measures against corruptibility, 2000).

In our study, we also found that the accused corruptors may position themselves as the victims, not the suspects. They believed they were being politicized and scapegoated by the people involved in the bad system/environment, a part of which they had become. In other words, they felt trapped and blamed their situation as being at the wrong place and time with the wrong people. We argue that this case will be common among politicians accused of corruption. However, as we do not have strong evidence to support our argument, further study is suggested to examine corruptions by comparing different types of perpetrators.

This research sheds light on the significant role of perception in corruption, illustrating how individuals' interpretations of corrupt behavior can motivate them to engage in corrupt activities and serve as a foundation for their subsequent denial and rationalization. By examining how perpetrators selectively interpret information to justify their actions, this study highlights the complex interplay between individual beliefs, societal norms, and legal definitions of corruption. However, it is crucial to acknowledge the limitations of this study, particularly its preliminary nature and the small sample size of participants (only five subjects). While the findings provide valuable insights, they should be a starting point for further investigation into this complex phenomenon.

Moving forward, future research should aim to expand upon these initial findings by conducting more extensive studies with larger and more diverse participant samples. Additionally, comparative analyses of corruption discourses across different societal contexts could yield valuable insights into the cultural, political, and economic factors that influence perceptions and behaviors related to corruption. By building upon this foundation, researchers can develop a more nuanced understanding of corruption and its implications for governance, ethics, and societal well-being on a global scale. Moreover, the present study does not extensively address the legal culture of corrupt individuals, particularly their legal cynicism and tendency to shift responsibility and blame onto others or external circumstances. Future research should explore this issue further.

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## Conclusion

The findings of our study indicate that perceptions and understandings of corruption can influence individuals to engage in corrupt activities. When certain actions are not perceived as corruption, defendants may deny the accusations and employ rationalization to justify their behavior. Therefore, we propose that, in addition to apprehending those involved in corrupt practices, socialization programs be implemented to clearly define what constitutes corruption. The goal is to ensure that individuals possess a shared understanding of corruption based on Indonesian law.

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ARTICLE

## Digital Age Pedagogy: How European and Asian Business School Students Perceive Competence-Oriented Education

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### ABSTRACT

This study examines the perceptions of competence-oriented educational practices in the digital age among business school students from European and Asian cultures. The statement emphasizes the need for essential competencies and maintaining a balance between study and personal life. The study sampled 800 undergraduate students, equally in Thailand and Bulgaria, to assess the impact of key competencies, digital literacy, and the integration of digital technologies on students' educational choices. The findings revealed significant differences in how students from these two regions perceive the importance of these factors. Thai students tend to emphasize a balanced set of competencies but are less inclined to value digital skills as highly as their Bulgarian counterparts. In contrast, Bulgarian students place a greater emphasis on digital competencies, reflecting the European education system's broader integration of digital literacy into its curricula. The evidence suggests that a global trend towards the recognition of digital technologies is crucial for achieving a study–life balance with minimal differences between the regions in this regard. This convergence suggests an emerging global consensus on the role of digital education in promoting lifelong learning. The authors

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recommend incorporating region-specific teaching philosophies to improve student engagement and promote a healthy study–life balance.

#### **KEYWORDS**

digital competency, higher education, business schools, literacy skills, cultural differences, digital age, study–life balance, regional educational philosophies

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## **Introduction**

Business schools face increasing digitization, internationalization, and competition on a global scale. The widespread use of digital technology in university education and the rise of alternative educational systems, such as Massive Open Online Courses (MOOCs), have intensified the supply of educational services worldwide. Various educational platforms such as Coursera<sup>1</sup>, edX<sup>2</sup>, Udemy<sup>3</sup>, LinkedIn Learning<sup>4</sup>, Futurelearn<sup>5</sup>, and Skillshare<sup>6</sup> offer such services. These are shorter courses focused on acquiring specific knowledge and skills, giving trainees a higher degree of career readiness through the possibility of faster assimilation and application in practice. Thus, business schools must meet the expectations of their current and future students, as well as the requirements of the labor market—employers and personnel users—competing not only with traditional academic institutions but also with alternative education systems and online platforms (Nurutdinova et al., 2023). Therefore, to be competitive and thrive, business schools must be in tune with the world’s leading innovation trends in higher education. Therefore, the question is how much and in what ways business schools, as academic institutions, should focus on teaching models that help students learn more specific skills in line with the needs of the job market and help them acquire those skills faster in the real world (Christensen & Eyring, 2011; Schlegelmilch, 2020). However, this question could also provoke a more comprehensive discussion, interpreted in the context of the fundamental choice that business schools have to make, that is between training built on basic scientific principles or a more market-oriented education (Gill & Lashine, 2003; Thirakulwanich et al., 2020).

<sup>1</sup> <https://www.coursera.org>

<sup>2</sup> <https://www.edx.org>

<sup>3</sup> <https://www.udemy.com>

<sup>4</sup> <https://www.linkedin.com>

<sup>5</sup> <https://www.futurelearn.com>

<sup>6</sup> <https://www.skillshare.com>

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Study–life balance is the condition where students maintain a harmonious distribution of their academic obligations and personal pursuits (Borowiec & Drygas, 2022; Darling-Hammond et al., 2023). Studies have recently evaluated it using self-reported assessments of individuals' well-being, their degree of satisfaction with their academic achievement, and their perception of stress levels (Padmanabhanunni et al., 2023). This research adopts a similar approach, utilizing validated survey instruments to measure students' perceptions of their balance. The study also examined cultural differences in how study–life balance is perceived and achieved, recognizing that students from different cultural backgrounds may have varying expectations and definitions of a “good” balance. The study offers an all-around awareness of the influence of study–life balance on students' academic achievements and welfare in various settings by examining these variables.

Representatives of Gen Z are extremely analytical and pragmatic in their approach to responsibilities (Francis & Hoefel, 2018); besides, they are more flexible and are inclined to change employers frequently (Benítez-Márquez et al., 2022). Experts anticipate that they will maintain their current job roles and professions, opting to operate as independent freelancers on multiple projects concurrently rather than within a particular company (Stanimirov, 2021). Friends' opinions and information from social media platforms such as Facebook<sup>7</sup>, Instagram<sup>8</sup> followers, and influencers strongly influence their decision about business school (Singer et al., 2023). Their pragmatism in choosing a university is expressed in the search for the so-called career readiness—the extent to which the higher educational institution provides an opportunity for quick, professional realization (Stanimirov, 2021), which is also influenced by factors such as the attractiveness of the region, the vision and public image of the university, and the type and number of specialties offered, including whether they sound “modern” enough.

The study aims to analyze the possibilities of business schools applying a competence-oriented educational approach in digital transformation and striving to achieve sustainability in study–life balance. Applying such an approach in the European area of higher education is strongly required by the European Commission's (EC) policies, and several European business schools are gradually integrating it into their curricula and programs. The research interest focused on establishing how students in Europe and other continents perceive this competency-based educational approach. The present study aims to verify whether significant cultural differences exist in the perceptions of students from Europe (business schools in Bulgaria, an EU member state) and Asia (business schools from Thailand) regarding applying a competence-oriented educational approach in digital transformation.

The study provides a novel contribution by examining how a balanced set of competencies, including digital, entrepreneurial, and sustainability skills, influences

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<sup>7</sup> 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.

<sup>8</sup> Instagram™ is a trademark of Instagram Inc., registered in the U.S. and other countries. По решению Роскомнадзора, социальная сеть Instagram полностью заблокирована в России как экстремистская организация.

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students' study–life balance and career readiness. The study also integrates the evolving expectations of Gen Z students, addressing the impact of modern educational practices on their academic and personal lives. This approach offers new insights into the role of business schools in preparing students for a rapidly changing global labor market. The study particularly aims to establish whether there are cultural differences in the two countries—representatives of European and Asian culture—regarding the role of individual types of competencies for future careers of students, the contribution of business schools to obtain these competencies, and their impact on students' decisions to continue their studies in the future. The research thus sets out to achieve the following objectives:

1. To assess how a balanced set of key competencies, including digital, entrepreneurial, personal, and social skills, impacts students' achievement of a satisfactory study and life balance.
2. To examine the specific influence of digital competencies on students' ability to maintain a good balance between their studies and personal life activities.
3. To investigate the effects of modern educational practices on students' study and life balance, such as the use of contemporary digital technologies, the promotion of equal opportunities and diversity, and students' engagement in their professors' research activities.
4. To explore the relationship between students' study and life balance, this includes academic sustainability and sustainability culture, and their intention to pursue further education, such as participating in short open online courses.

## Literature Review

Digital technologies, transformation, and globalization have significantly altered the business environment, the labor market, and the required qualifications for higher education students. The COVID-19 pandemic acted as a catalyst, accelerating these changes (Gkrimpizi et al., 2023; Hetmańczyk, 2023). This has heightened the demand for continuous development of digital competencies in both the public and private sectors (Gopika & Rekha, 2023). The DigComp framework<sup>9</sup>, an initiative of the European Commission, provides a structured approach to digital competencies. It breaks down digital competencies into five areas: information and data literacy, communication and collaboration, digital content creation, safety, and problem-solving. Carretero et al. (2017) further divides each area into specific competencies. The framework identifies five main areas, which include “browsing, searching, and filtering data, information, and digital content,” “interacting through digital technologies,” “creating and editing digital content,” “protecting devices,” and “identifying digital solutions,” and within them, it specifies 21 competencies (Carretero et al., 2017).

Calvani et al. (2012) explored digital competence among teenagers in Italy. They define digital literacy as the safe and appropriate use of digital technologies to access, manage, integrate, communicate, evaluate, and create information. The study highlights the diverse components of digital literacy, emphasizing the

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<sup>9</sup> <https://digcomp.digital-competence.eu>

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importance of understanding how to use tools and engage critically and ethically in digital environments. This perspective aligns with the European Commission's initiatives to enhance digital education across member states. The main ones are the Digital Education Action Plan 2021–2027, the Digital Competence Framework for European citizens (Carretero et al., 2017), and the Council of Europe's recommendation on key lifelong learning competencies (Council of the European Union, 2018). In the latest document, the EC defines key competencies as a dynamic combination of knowledge, skills, and attitudes that the learner needs to develop throughout their life. The EC believes that applying competency-oriented approaches in all educational, training, and learning environments can ensure their acquisition through high-quality and inclusive education, training, and lifelong learning (Council of the European Union, 2018).

Business schools in the European Union had to update their curriculum in line with the European Framework for Key Competences (Council of the European Union, 2018). This is one of the reasons that dictated the need for the present study. This study is related to the implementation of a competence-oriented educational approach in European business schools, which aligns with the recommendations of the European Commission on education, training, and learning models. Applying such approaches necessitates a study of students' perceptions, and it would be of interest to investigate potential cultural differences between European and Asian students in this context. Competency-based education/learning (Gervais, 2016; Sultan et al., 2020) and competency-based curricula (Kenya Institute of Curriculum Development, 2018; Soare, 2015) could provide the theoretical foundations of competency-based educational models.

Competency-based education, especially in higher education, requires institutions to be flexible and responsive. It calls for a shift from traditional teaching methods and emphasizes the importance of preparing students to meet the challenges they will face in their careers. With the rapid advancements in technology and the ever-changing job market, higher education institutions should ensure that students are equipped with the knowledge, skills, and abilities they need to succeed. In addition to digital competencies, the EC describes eight more competencies as extremely important: literacy, multilingual, mathematical, social, entrepreneurial, citizenship, and cultural awareness and expression competencies (Council of the European Union, 2018).

The COVID-19 pandemic transformed the relationship between employers, managers, and employees in organizations. The pandemic has changed the work of both managers and employees, confirming normal "remote work," increasing the use of more and more technology in the management process, and changing the expectations of employees (Błaszczuk et al., 2023; Gavin et al., 2022). The need for employers and managers to support and understand their employees during a pandemic, such as by arranging their work from home, teaching their children from home, and ensuring their health, has led to a more emotional and supportive relationship between managers and employees (Kropp et al., 2021; Peter & Ndinojuo, 2024). Deardorff (2011) and Pérez García et al. (2021) researched the concept of intercultural competence, closely related to cultural awareness and expression competencies. Intercultural competence is vital in today's

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globalized world, where interactions across diverse cultures are commonplace. The researchers emphasized the importance of understanding one's culture and effectively communicating and interacting with individuals from different cultural backgrounds. They also discussed various assessment methods and models to gauge intercultural competence, underscoring its significance in educational settings and the workplace.

Asian educational frameworks, especially in Thailand, exhibit a cultural inclination towards memory-based learning, with conventional educational methods historically emphasizing rote memorization. This approach significantly contrasts with Western educational systems, such as in Bulgaria, where the development of critical thinking and analytical skills has traditionally held greater importance, even before the widespread use of digital tools (Al-khresheh, 2024; Başaran et al., 2024). Although digital teaching approaches have been implemented in Thailand, the traditional focus on memorizing remains prevalent (Al-khresheh, 2024; Wilang, 2024). In contrast, Bulgarian educational methods have constantly emphasized the importance of critical thinking, which is reinforced by a strong emphasis on study and inquiry (Başaran et al., 2024; Guo et al., 2020).

In recent years, an increasing number of scientists investigating the role of different types of competencies in students' learning processes and their future professional and personal realization have concluded that a balance should be found between these competencies (Infante-Moro et al., 2019; Kim et al., 2019; Škrinjarić, 2022). Business school curricula provide a balanced set of key competencies that are associated with greater career readiness and faster professional realization, while also promoting a better balance between the learning process and the students' personal lives (Rychen & Salganik, 2003).

While the balance between key competencies in education is a global concern, individual countries have taken distinct pathways in reforming their higher education systems to address contemporary challenges. One notable example is Thailand, which has embarked on an ambitious journey of transforming its higher education landscape. Thailand prioritized higher education research studies by developing a 15-year long-term plan (Dipendra, 2023; Scott & Guan, 2022). Thailand began reforming higher education in the 1990s, and this is still ongoing. However, even before the 1990s, there was a gradual shift in Thailand toward private higher education. The Private College Act of 1969 authorized six private higher education institutions to use the term "college," gradually allowing these schools to transition from associate to bachelor's degrees. Indeed, higher education in Thailand has grown dramatically since the COVID-19 pandemic (Leurcharusmee et al., 2023). Given the government's five-year national development plan, which expects higher education to drive economic growth, this educational sector has seen rapid growth (Napathorn, 2022).

With the changes in the research-based learning process, Khon Kaen University is one of nine national research-based learning universities. To conduct quality research studies, the university required a solid foundation, with a focus on research culture and the intellectual product of its students. The student's development had to be carried out in order for them to be able to associate the relationship of intellectual ability, real practice, and research process through instructional management in various courses

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of the program until it became a desirable characteristic of the students. Therefore, knowledge management, as a research-based mechanism, significantly contributed to the integration of instructional management and research-led teaching (Prayuth et al., 2014; Tungkasamit & Junpeng, 2012). Thailand's higher education landscape has undergone significant transformation over the past few decades, aiming to elevate the quality of research and teaching in universities nationwide. Khon Kaen University, which is part of the national research universities initiative, is a testament to this shift towards research-based learning. In the late 20<sup>th</sup> century, Thai universities traditionally focused on a teaching-centric approach. However, with the onset of globalization and the increasing need for innovation, there was a paradigm shift towards integrating research into the curriculum, emphasizing knowledge creation (Hallinger & Chatpinyakoo, 2019).

The Thai government, recognizing the importance of research for economic growth and global competitiveness, introduced policies to foster a research culture in higher education institutions. This led to increased funding for research projects, collaborations with international institutions, and the establishment of centers of excellence in various domains (Salmi & Bassett, 2014; Thawesaengskulthai et al., 2024). Transitioning to a research-based model was challenging. Universities had to revamp their curricula, train faculty in research methodologies, and build infrastructure to support intensive research activities. However, this shift also allowed Thai universities to collaborate internationally, attract global talent, and produce groundbreaking research with real-world applications (Buasuwan, 2018; Rhein, 2017). The push towards research-based learning has borne fruit. Thai universities, including Khon Kaen, have seen a surge in research publications, patents, and collaborations. Moreover, students graduating from these institutions are better equipped with critical thinking and problem-solving skills, making them highly sought after in the job market (Pimpa, 2003; Ruchiwit et al., 2019). As Thailand continues to emphasize the role of research in higher education, the country is poised to become a hub for innovation in the ASEAN region. With continued government support and collaboration with the private sector, the future of research-based learning in Thailand looks promising (Jongbloed & Vossensteyn, 2016).

### ***Hypothesis and Conceptual Framework Development***

Our conceptual research model employs a competency-based educational approach to support our first hypothesis. As a learning framework based on a predefined set of competencies, we use the groups of competencies described in the Council of Europe Recommendation on Key Competencies for Lifelong Learning (Council of the European Union, 2018). The use of modern technologies in business schools' educational processes would enable a higher degree of individualized and personalized student training, as well as diverse and timely feedback. The researchers proposed the first hypothesis in the following way:

**Hypothesis 1 (H1):** The development of a balanced set of key competencies (including digital, entrepreneurial, personal, and social skills) is positively associated with students' ability to effectively manage and maintain a healthy balance between their academic and personal life.

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Digital competencies, encompassing skills like digital communication, information literacy, and problem-solving in online environments, have enhanced efficiency in the learning process. According to Henderson et al. (2017), students with adept digital competencies are often better equipped to manage their study time, utilize online resources, and streamline learning. As a result, these students often spend less time on academic tasks, leading to better work–life balance. Furthermore, effectively navigating and using online collaborative tools can reduce the time spent on group projects and assignments. Students proficient in digital collaboration tools often find group work less time-consuming, which can positively impact their study–life balance. Moreover, in online and blended learning, digital competencies are crucial. Tamim et al. (2011) conducted a meta-analysis on the impact of technology on learning. They found that students with strong digital competencies often experience more flexible learning schedules, allowing them to balance academic and personal lives more effectively. Conversely, empirical studies have also demonstrated that enhancement in technological competencies has the potential to adversely impact education in four ways: eroding students' proficiency in reading and writing, degrading educational settings, blurring social interactions between educators and learners, and fostering individual isolation during technology usage (Alhumaid, 2019; Timotheou et al., 2023). This review led to the proposal of the next hypothesis:

**Hypothesis 2 (H2):** The enhancement of digital competencies is positively associated with students' ability to effectively balance their academic responsibilities and personal life activities.

A global trend is an orientation toward implementing ideas for sustainable development and responsible learning in business schools (van Weenen, 2000) and creating a culture of socially responsible and sustainable leadership (Aguinis & Glavas, 2019). It aligns with Gen Z students' growing sensitivity to social engagement issues. Some business schools are offering more and more courses on these issues, developing full academic programs. For example, the Presidio Graduate School in San Francisco offers an MBA in Sustainable Solutions, and the University of Otago in New Zealand offers an MBA in Sustainable Business. The University of Wales Sustainability Leadership Online Master's Program is also available (Jack, 2020). The international community increasingly considers the provision of equal opportunities and access to higher education for different social groups to be a pressing issue, as well as the reduction of inequalities, including the prevention of discriminatory practices in higher education. These challenges are also enshrined in the UN Sustainable Development Goals. Several EC funding programs support its use in higher education and scientific research (European Commission, n.d.).

**Hypothesis 3 (H3):** An education using contemporary digital technologies, ensuring equal opportunities and diversity, as well as involving students in research activities of their professors positively influences good study and life balance.

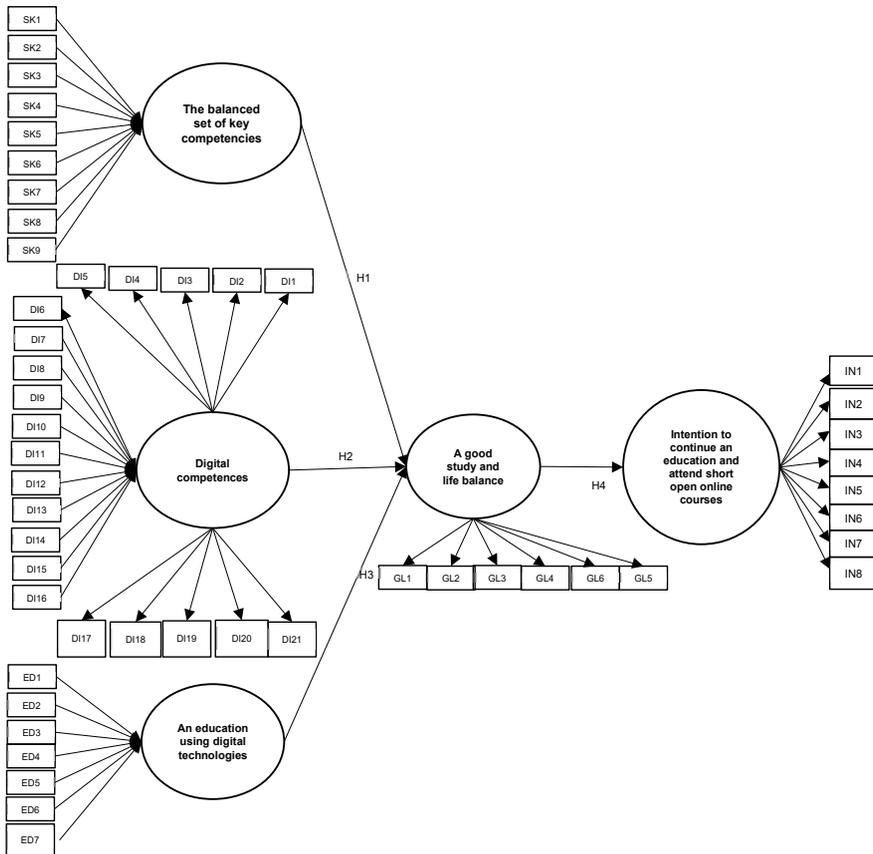
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In studies of the attitudes of students and employers toward the educational process in business schools, there is undoubtedly a very strong focus on developing digital competencies and using modern technologies in the research and teaching processes (Henderson et al., 2017). However, these practices have both positive effects and raise ethical dilemmas, as noted by Tamim et al. (2011). Meanwhile, Serafimova and Andreeva (2021) recommend educational models for business schools that aim to balance the competencies and innovations generated by digital technologies with proven good traditional educational practices, including sustainability principles and practices. A possible approach is implementing an ambidextrous educational model (O'Reilly & Tushman, 2013), in which institutions simultaneously pursue efficiency in current educational practices while experimenting with innovative teaching and learning methods. Thus, academic institutions contribute to achieving sustainable development goals by creating a culture for sustainable and responsible business while developing a balanced set of diverse competencies necessary for students to successfully realize themselves in the conditions of a technological revolution. An approach that integrates competency-based educational models with research-based strategies is essential for promoting academic sustainability and fostering a culture of responsible, sustainable leadership in business schools. According to Healey and Jenkins (2009), developing undergraduate research and inquiry is crucial, as outlined in their work *Developing Undergraduate Research and Inquiry* published by the Higher Education Academy. The fourth hypothesis was proposed as:

**Hypothesis 4 (H4):** A good study and life balance (including academic sustainability/sustainability culture) positively influence intention to continue education and attend short open online courses.

This conceptual framework visually represents the relationships among key variables related to digital competencies in education (Figure 1). The first construct is the Balanced Set of Key Competencies (SK1–SK9). They are the foundational skills required for education, grouped under the first construct. This is hypothesized to influence digital competencies (H1). The second construct—Digital Competencies (DK1–DK8)—focuses on the specific digital skills required for modern education. This construct is influenced by the balanced set of key competencies (H2) and is also linked to educational outcomes and the use of digital technologies. The construct Education Using Digital Technologies (ED1–ED7) represents the use of digital technologies in education, suggesting that digital competencies are essential for the effective use of these technologies (H3). The construct of Good Study–Life Balance (GL1–GL5) is concerned with the outcomes of good education, hypothesized to be influenced by digital competencies (H2) and the balanced set of key competencies (H3). Intention to Continue Education (I4–I8) is the final construct, which represents students' intention to continue their education and is linked to both educational outcomes and digital competencies (H4). The arrows represent hypothesized relationships (H1–H4) between these constructs, showing how they influence each other to lead to educational outcomes.

**Figure 1**  
*Hypothesized Model of a Good Study and Life Balance in Intention to Continue an Education and Attend Short Open Online Courses*



Note. Source: developed by the authors.

## Methodology

This study applied a mixed-method qualitative and quantitative survey research design that identifies the most important factors influencing students' intention to continue education and attend short open online courses. The study follows a research plan of three phases. The first phase is the qualitative aspect, which involves building the theory by conducting a literature review to create a foundation and initial estimation model, as well as determining a suitable method to analyze the data. The next two phases cover the quantitative aspect; the second phase involves data collection, which includes preparing and conducting the survey, and the third phase analyzes the data and synthesizes it with the literature to conclude.

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Undergraduate students from higher education institutions in Thailand and Bulgaria made up the research population, with a focus on specific demographics that the competencies in question could affect, such as those studying business, management, and related fields. We determined the sample size using the Krejcie and Morgan (1970) table. As a result, a minimum sample size of 378 participants was required to accurately estimate the percentage with a maximum error of 5% at a 95% confidence level. We standardized the value at 400 to ensure consistency. We multiplied this value by two, taking into account the independent data collection in Bulgaria and Thailand, resulting in a total population of 800.

At the second phase, we collected data using a developed online questionnaire with a five-point Likert scale to determine respondents' perceptions of the relevant factors. We pretested the questionnaire on 30 students to optimize its efficiency, and the results met all the research's intended variables. At the final phase, that is analysis, the results obtained from Thai and Bulgarian respondents are compared. The participating institutions distributed the questionnaires via group social media platforms. We obtained informed consent from all respondents prior to their involvement in the study. Participants were fully informed of their rights, including the option to withdraw from the study at any point during the data collection process, without any penalty or consequence. We used descriptive statistics to describe general information and a structural equation model (SEM) to test hypotheses based on the collected data.

The fundamentals of multi-group analysis stipulate that this method requires the participation of two or more groups. According to Cheah et al. (2023), the z-test is adequate for performing multi-group analysis with a large sample size. In practice, the t-test is limited for small sample sizes and therefore insufficient for large ones. Researchers use the z-test for two population proportions to determine if there is a significant difference in some exogenous to endogenous construct influences between two populations or groups, such as Thailand and Bulgaria. Consequently, it is important to emphasize two requirements: a sample drawn randomly from each population group to be compared; a sample size of more than 30 should be used. The information should be categorical.

## Results

### *The Respondents' Descriptive Information*

The analysis of 310 (77.50%) responses from Thailand and 303 (75.75%) from Bulgaria yielded a combined questionnaire completion rate of 76.63%. Ali et al. (2021) and Gleiser et al. (2022) inform that acceptance rates above 60% are appropriate. Therefore, the survey completion rates in this study are above the limits. The majority of the respondents, 509 (83.03%), were born after 1997, while 104 (16.97%) were born before or in 1997. Of the Thai respondents, 294 (47.96%) were born after 1997, and 16 (2.61%) were born before or in 1997. Of the Bulgarian respondents, 215 (35.07%) were born after 1997, and 88 (14.35%) were born before or in 1997. Most of the respondents were in their 1<sup>st</sup> year at the university, representing 212 (34.58%), followed by the 3<sup>rd</sup>

year, representing 127 (20.72%), and the 2<sup>nd</sup> year, representing 109 (17.78%). In years 4 and 5, the number of respondents was 91 (14.85%) and 63 (10.28%), respectively, while the lowest number of respondents, 5 (0.82%), were in the 6<sup>th</sup> year of the university. Most of the respondents majored in Finance, representing 217 (35.40%), followed by Management, representing 158 (25.77%); Marketing, representing 141 (23.00%); and the least in Hospitality and Event, representing 97 (15.82%). The majority of Thai respondents are in Finance major, representing 174 (28.38%), and Bulgarian respondents are in Management major, representing 127 (20.71%). A minority of Thai respondents, representing 44 (7.17%), and Bulgarian respondents, representing 53 (8.62%), studied hospitality and events.

**Verifying the Completeness of the Data Brunning the Statistical Analysis**

Skewness and kurtosis are the most popular methods for data cleaning and reforming, which give meaningful information for the normal distribution. In addition, skewness and kurtosis can be used to calculate this distortion. The analysis of the skewness and kurtosis of the data revealed that  $-0.468$  is the minimum skewness of Thailand data,  $-0.469$  is for Bulgaria, whereas the maximum was  $-0.158$  for Thailand data and  $0.042$  for Bulgaria data. While the minimum kurtosis of Thailand data amounted  $-0.278$  and  $-0.842$  for Bulgaria data, the maximum kurtosis comprised  $0.661$  for Thailand data and  $0.583$  for Bulgaria data (Table 1). It can be seen that the skewness and prevalence of the data were between  $-2$  and  $2$ , which indicated that the data was normally distributed.

**Table 1**  
*The Skewness and Kurtosis Test*

|    | Thailand |            | Bulgaria |            | Thailand |            | Bulgaria |            |
|----|----------|------------|----------|------------|----------|------------|----------|------------|
|    | Skewness | Std. Error | Skewness | Std. Error | Kurtosis | Std. Error | Kurtosis | Std. Error |
| SK | -.346    | .138       | -.469    | .140       | -.239    | .276       | -.588    | .279       |
| DI | -.409    | .138       | -.173    | .140       | -.041    | .276       | -.837    | .279       |
| ED | -.176    | .138       | .042     | .140       | -.278    | .276       | -.842    | .279       |
| GL | -.468    | .138       | -.363    | .140       | .149     | .276       | -.345    | .279       |
| IN | -.158    | .138       | -.637    | .140       | .661     | .276       | .583     | .279       |

Note. SK = The balanced set of key competencies, DI = Digital competencies, ED = An education using digital technologies, GL = A good study and life balance, IN = Intention to continue an education and attend short open online courses.

Table 2 revealed the highest correlation coefficient of  $.811$  between the balanced set of key competencies and digital competencies, followed by the correlation coefficient of  $.708$  between digital competencies and education using digital technologies. Meanwhile, the correlation coefficient for digital competencies to continue education and attend short open online courses was the lowest, at  $.157$ . The tolerance and VIF analyses are shown in Table 3.

**Table 2**  
*The Correlation of the Coefficient Matrix*

|    | SK    | DI    | ED    | GL    | IN    |
|----|-------|-------|-------|-------|-------|
| SK | 1.000 |       |       |       |       |
| DI | .811* | 1.000 |       |       |       |
| ED | .608* | .708* | 1.000 |       |       |
| GL | .609* | .654* | .677* | 1.000 |       |
| IN | .158* | .157* | .147* | .192* | 1.000 |

*Note.* \* $p < .05$  was statistically significant at the .05 level. SK = The balanced set of key competencies, DI = Digital competences, ED = An education using digital technologies, GL = A good study and life balance, IN = Intention to continue an education and attend short open online courses.

A test for multicollinearity is the association between five variables that can be tested (Tabachnick & Fidell, 2007). They increase the magnitude of the error term and the standard error of the regression coefficient. As a result, the statistical significance of the coefficients is reduced. Hair et al. (2010) advocate using tolerance and the Variance Inflation Factor (VIF) in multicollinearity problems with cut-off values greater than 0.1 but less than 10.0. Table 3 shows that the tolerance values range from 2.700 to 4.221, which is much higher than 0.1. This implies that the highly correlated variables contain extraneous data that should be removed because not all of them are required for the analysis. Furthermore, the VIF ranges from 2.122 to 4.147, indicating that multicollinearity is not an issue with the exogenous variables.

**Table 3**  
*Tolerance and VIF Analysis*

| Models | Thailand  |       | Bulgaria  |       |
|--------|-----------|-------|-----------|-------|
|        | Tolerance | VIF   | Tolerance | VIF   |
| SK     | .331      | 3.019 | .318      | 3.142 |
| DI     | .237      | 4.221 | .260      | 3.847 |
| ED     | .330      | 3.030 | .440      | 2.271 |
| GL     | .370      | 2.700 | .471      | 2.122 |
| IN     | .334      | 3.580 | .280      | 4.147 |

*Note.* SK = The balanced set of key competencies, DI = Digital competences, ED = An education using digital technologies, GL = A good study and life balance, IN = Intention to continue an education and attend short open online courses.

When the correlation coefficient between the five observed variables was considered, the correlation matrix was examined. The reliability coefficients and average variance extracted (AVE) for all constructs were greater than 0.5, ranging from 0.502 to 0.648. Farrell and Rudd (2009), as well as Fornell and Larcker (1981), state that an AVE must be greater than 0.5. Each concept's AVE was higher than the recommended value, indicating discriminant validity. Each construct's AVE exceeded

0.50 of the total variances, indicating convergent validity (Table 4). The CR for all constructs was greater than 0.60, ranging from 0.839 to 0.949. All square roots of AVEs were greater than correlations between pairs of constructs when Farrell and Rudd (2009) used the most rigorous method to examine discriminant validity. This revealed adequate discriminant validity (Table 4).

**Table 4**  
*The Reliability and Convergent Validity Test*

| Items  | Factor loading | $\alpha$ | AVE   | CR    |
|--|----------------|----------|-------|-------|
| <i>The balanced set of key competencies</i>    |                |          |       |       |
| SK1  | 0.76           | .732     | 0.559 | 0.919 |
| SK2  | 0.70           | .774     |       |       |
| SK3  | 0.63           | .710     |       |       |
| SK4  | 0.71           | .781     |       |       |
| SK5  | 0.80           | .771     |       |       |
| SK6  | 0.80           | .747     |       |       |
| SK7  | 0.75           | .710     |       |       |
| SK8  | 0.78           | .738     |       |       |
| SK9  | 0.78           | .739     |       |       |
| <i>Digital competences</i>                     |                |          |       |       |
| DI1  | 0.79           | .793     | 0.648 | 0.949 |
| DI2  | 0.83           | .765     |       |       |
| DI3  | 0.80           | .773     |       |       |
| DI4  | 0.80           | .777     |       |       |
| DI5  | 0.77           | .777     |       |       |
| DI6  | 0.79           | .815     |       |       |
| DI7  | 0.82           | .827     |       |       |
| DI8  | 0.83           | .802     |       |       |
| DI9  | 0.81           | .824     |       |       |
| DI10   | 0.81           | .793     |       |       |
| <i>An education using digital technologies</i> |                |          |       |       |
| ED1  | 0.44           | .743     | 0.502 | 0.871 |
| ED2  | 0.78           | .729     |       |       |
| ED3  | 0.76           | .711     |       |       |

**Table 4 Continued**

| Items  | Factor loading | $\alpha$ | AVE   | CR    |
|--|----------------|----------|-------|-------|
| ED4  | 0.81           | .727     |       |       |
| ED5  | 0.51           | .707     |       |       |
| ED6  | 0.78           | .793     |       |       |
| ED7  | 0.78           | .701     |       |       |
| <i>A good study and life balance</i>   |                |          |       |       |
| GL1  | 0.64           | .759     | 0.526 | 0.847 |
| GL2  | 0.75           | .760     |       |       |
| GL3  | 0.77           | .700     |       |       |
| GL4  | 0.74           | .794     |       |       |
| GL5  | 0.72           | .755     |       |       |
| <i>Intention to continue an education and attend short open online courses</i> |                |          |       |       |
| IN1  | 0.92           | .766     | 0.638 | 0.839 |
| IN2  | 0.76           | .772     |       |       |
| IN3  | 0.70           | .735     |       |       |

The correlation coefficients were all positive, indicating that the correlation was directional. This meant that all of the variables fit within the conceptual and theoretical framework of the researchers' structural equation model (Tabachnick & Fidell, 2007).

### **Summary of Hypotheses Evaluation**

The data presented in Table 5 provides compelling evidence of a correlation between a well-rounded set of key competencies, digital literacy, and the use of digital technologies in an educational framework. Such a connection influences achieving a harmonious study–life equilibrium and fostering the inclination to pursue further education through digital modalities, specifically through short, open online courses. The exploration of these variables suggests the possibility of a causal chain in which integrating a balanced suite of key competencies and digital acumen within the context of digital education contributes significantly to a balanced academic and personal life experience. Moreover, this integration is associated with a predisposition for ongoing engagement with digital learning platforms. Adding credence to the theoretical postulations established before the study, the empirical evidence garnered from the research substantiates the preconceived hypotheses. As delineated in Figure 1, the analysis reveals that the balance of key competencies stands out as the most critical determinant among the examined factors. The role of digital competencies sequentially follows this and, finally, the impact of an educational paradigm incorporating digital technologies.

**Table 5**

*The Characteristics of Influence Showing a Causal Relationship Between the Variables and Hypothesis Testing*

| Hypothesis   | B   | p value | Supported hypothesis |
|--|-----|---------|----------------------|
| H1: The balanced set of key competencies positively influence to a good study and life balance                                 | .70 | .004    | Yes                  |
| H2: Digital competencies positively influence a good study and life balance  | .30 | .027    | Yes                  |
| H3: An education using digital technologies positively influences good study and life balance                                  | .17 | .115    | Yes                  |
| H4: A good study and life balance positively influence to intention to continue education and attend short open online courses | .78 | .100    | Yes                  |

**Structural Equation Modeling**

The harmony between models and the empirical data determined from the statistical value  $\chi^2/df$  should be less than 3.00. The probability of testing the variance matrix of variables in the approximate model with the empirical data must exceed the statistical significance level of 0.120 ( $p > .05$ ) so that it can be accepted that the model is consistent with the data (Jaroenwanit et al., 2022). The harmonization index must be greater than 0.90, i.e., the goodness of fit index (GFI), the comparative fit index (CFI), and the non-conformance index or residual index must be less than 0.08. RMSEA is the root mean square error of approximation (RMSEA), and the root means a square error of standard error is the standardized root mean squared residual (SRMR). The results indicated that the intervariable relationship model was consistent with the empirical data. The statistical values passed all specified criteria, as shown in Table 6 and Figure 2.

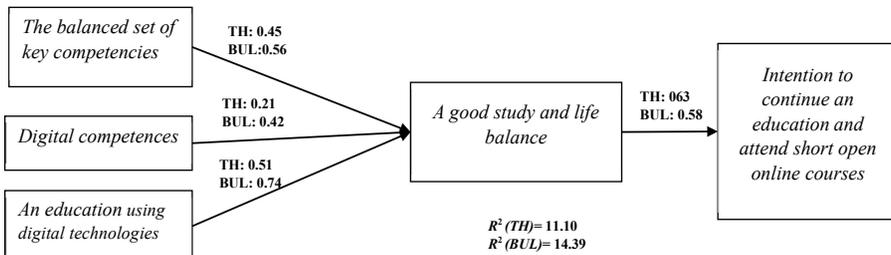
**Table 6**

*The Results of the Consideration of the Coherence Values of the Direct Influence Path Analysis Model*

| Statistical Values | Criteria for consideration | Statistics | Results |
|--------------------|----------------------------|------------|---------|
| c                  | –                          | 20.285     | –       |
| df                 | –                          | 14.000     | –       |
| c                  | should be less than 3.00   | 1.448      | Pass    |
| p                  | more valuable 0.05         | 0.120      | Pass    |
| CFI                | more valuable 0.90         | 0.905      | Pass    |
| GFI                | more valuable 0.90         | 0.907      | Pass    |
| RMSEA              | less than 0.08             | 0.037      | Pass    |
| SRMR               | less than 0.08             | 0.047      | Pass    |

**Figure 2**

*The Analysis of Factors Influencing the Causal Relationships Between the Variables and Hypothesis Testing of Thailand and Bulgaria*



Note. Source: developed by the authors.

### **The Difference Between European and Asian Students' Perception**

The z-test for comparing the multi-group analysis in SEM shows the outcome of the z-test approach, which included Asian (Thailand students) and European (Bulgaria students), z-score, and *p*-value for each construct provided (Table 7). All of these constructs meet the required level of .05, according to the *p*-value result. Thus, the conclusion can be made of a significant difference between exogenous and endogenous constructs in the Asian and European regions.

**Table 7**

*Multi-Group Analysis Using z-Test*

| z-Test Approach  | Asian   | European | z-score | <i>p</i> -value |
|--|---------|----------|---------|-----------------|
| H1: The balanced set of key competencies positively influence to a good study and life balance                                 | 0.0812  | 0.0874   | 0.0123  | .0115           |
| H2: Digital competencies positively influence a good study and life balance  | 0.5463  | 0.6223   | 0.0078  | .0489           |
| H3: An education using digital technologies positively influences good study and life balance                                  | 0.0254  | 0.0244   | 0.0420  | .0012           |
| H4: A good study and life balance positively influence to intention to continue education and attend short open online courses | 0.17881 | 0.1778   | 0.0005  | .0454           |

## **Discussion**

The statistical analysis presented in Table 7, which was conducted using z-test, provides a stimulating examination of the differences in perspectives among representatives of Asian and European cultural domains as illustrated by Thai and Bulgarian students, respectively. The outcome of this analysis indicates marked discrepancies across all hypothesized areas of comparison, which underscores a deeper, multilayered dialogue that transcends mere geographical dichotomies. This

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divergence in perceptions may be rooted in a complex variety of cultural variables, reflecting distinct values, beliefs, and social norms that are innate to Asian and European societies. The cultural dimension may influence educational expectations, learning styles, and communication patterns, which are essential ingredients in perceiving and interfacing with the educational process, including the acceptance and use of digital technologies in learning environments. Also, pedagogical traditions distinct to each region likely contribute to these observed differences.

The mode of instruction, emphasis on rote learning versus critical thinking, the role of the instructor, and the structure of academic programs can dramatically influence student perceptions and reactions towards educational experiences. These pedagogical elements may well echo through the results reflected in the z-test scores. Another aspect to consider involves socioeconomic disparities. Variations in access to resources, educational infrastructure, and technological advancements could play an important role in shaping the perceptions and expectations of students from these diverse locales. Furthermore, socioeconomic status can influence students' ability to engage with digital tools for learning, potentially reinforcing the divide captured by the analysis. The differences uncovered by the statistical assessments invite educators, policymakers, and researchers to investigate the underpinnings of these disparities. It suggests the necessity for a culturally responsive and socio-economically sensitive approach to the design and implementation of educational strategies, particularly those involving digital technology.

The exploration of the first hypothesis (H1) reveals a consensus between students from both Asian and European regions on the significance of a comprehensive set of key competencies in promoting an effective study–life balance. Nonetheless, a slightly higher valuation of this aspect is discernible among European students (Bulgaria) in comparison to their Asian counterparts (Thailand). This variation may reflect deeper educational philosophies and historical practices that characterize each region. The European education system, particularly Bulgaria in this study, has a longstanding tradition that encourages a well-rounded educational experience. Kreber (2009) examined the historical inclination of European pedagogy to prioritize holistic development, nurturing not only cognitive capabilities but also critical thinking, creativity, and emotional intelligence. Such an approach could naturally embed an appreciation for a set of diversified competencies that balance technical knowledge with soft skills, thereby contributing to a more integrated study-life dynamic.

On the other hand, Asian education systems, typified in this instance by Thailand, have traditionally upheld a different set of pedagogical values. Kim (2005) highlights the tendency toward rote learning and memorization, which, while effective for knowledge retention, may not provide the same support for balancing academic rigors with the demands of personal life. This historical focus could potentially influence the perception of key competencies among Asian learners, shaping the prioritization of certain skills and the integration of study habits into their broader lifestyle. It is important to note, however, that global educational reforms are catalyzing changes in the Asian educational landscape. Influences such as technology integration, cross-cultural exchanges, and international educational

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standards are reshaping customary learning modalities, potentially bridging the gap between Asian and European perceptions of a balanced educational approach. This evolving educational ecosystem calls for further inquiry into the dynamics between these shifting paradigms and student perceptions. As the educational systems of Asian regions such as Thailand continue to reform and adapt, the examination of how these changes impact student experiences, competency development, and study-life integration will be particularly enlightening.

The second hypothesis (H2) unearths a more pronounced difference in perceptions between the Asian and European cohorts regarding the valuation of digital competencies. European students, herein from Bulgaria, attributed greater importance to digital skills, a preference that may be reflective of the European education sector's voracious embrace of digital transformation. Schools and universities in Europe often integrate technology not only as a subject of instruction but also intrinsically into the pedagogy itself, facilitating the development of digital literacy alongside traditional academic subjects (Ertmer & Ottenbreit-Leftwich, 2013). This widespread digital integration in European curricula could be a byproduct of both sociocultural attitudes towards technology and education policies that actively promote digital readiness as a core student competency. These regions' educational infrastructure and public policy typically support continuous investment in technological resources and training, ensuring the cultivation and alignment of digital competencies with evolving labor market demands. Although Thailand has demonstrated a committed effort to incorporate digital education throughout its learning processes, disparities in technological infrastructure, access, and resource allocation could present hurdles. The pace at which digital integration occurs may not be consistent across various educational institutions or geographic areas within the country. This uneven progress, combined with cultural and socioeconomic factors, may influence the varying degrees of emphasis placed on digital skills by Thai students. As Thailand and similar Asian regions press forward with educational reforms aimed at reinforcing digital literacy, further investigation into the precise factors influencing the adoption and valuation of digital competencies will be invaluable. Such research may inform targeted interventions that facilitate the advancement of digital learning, ensuring that all students, irrespective of their geographical location, have equitable opportunities to develop critical 21<sup>st</sup>-century skills.

Hypothesis 3 presents a scenario where the observed discrepancies between the Asian and European regions are minimal, hinting at an emergent global convergence in attitudes towards adopting and integrating digital technologies within educational spheres. This subtle difference underscores a collective recognition across diverse geographies of the instrumental role that digital technologies play in augmenting study-life balance. This understanding is becoming increasingly ubiquitous as societies worldwide navigate the complexities of the digital age. The trend towards a more unified perspective on digital education aligns with the forces of rapid globalization, which have been extensively reshaping educational paradigms. The influence of global connectivity means that regional boundaries no longer confine educational practices, resources, and philosophies. This has fostered a more

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standardized approach to incorporating digital tools and platforms into learning environments. Recent historical developments, most notably the COVID-19 pandemic, have precipitated an unprecedented acceleration of this trend. The pandemic acted as a catalyst, compelling educational institutions worldwide to rapidly adopt online learning modalities (Crick, 2020). This abrupt shift highlighted the viability of digital education and essentially democratized access to it, dismantling many pre-existing regional disparities in digital readiness and exposure.

The findings regarding Hypothesis 4 reveal a convergence in perspectives between the two examined regions, underscoring a universal acknowledgment of the importance of study–life balance as a key factor influencing the decision to pursue continuing education. This shared recognition transcends cultural and geographical boundaries, reflecting a global shift in educational values. The availability and accessibility of flexible online courses and sophisticated digital platforms have been instrumental in this shift. These innovations in the educational space provide learners with the autonomy to tailor their academic pursuits in concert with their personal lives. Such flexibility is particularly appealing to a diverse student population that includes working professionals, parents, and those with various other commitments outside of the academic sphere (Selwyn, 2016).

The research emphasizes the cultural distinctiveness of memory in Asian educational methods (exemplified by Thailand), where the traditional focus has been on rote learning. This contrasts with Western traditions (Bulgaria), where critical thinking and analytical abilities were more important, even before the broad use of digitalization. Although digital teaching methods have been included in education in Thailand, the traditional emphasis on memorizing remains deeply ingrained (Al-khresheh, 2024; Wilang, 2024). From the other spectrum, Bulgarian educational practices have always emphasized the need for critical thinking, which is further reinforced by a research-focused approach (Başaran et al., 2024; Guo et al., 2020). The study acknowledges the necessity of further investigating the impact of digital technologies on cultural practices, specifically in Thailand, where it is essential to strike a balance between the traditional emphasis on memorizing and the increasing need for critical thinking in education. The contrast with Bulgaria highlights the wider significance of these distinct educational ideologies in adjusting to contemporary educational requirements.

Students, irrespective of their location, now have the opportunity to engage with learning at a pace and schedule that aligns with their individual needs. This more fluid and customizable approach to education offers a pathway to achieving a balance that was traditionally elusive, particularly in rigid, time- and place-bound educational models. The trends indicate that such balance is not a mere convenience but a substantial attribute that can enhance educational engagement and success. Educational providers and policymakers must prioritize supporting digital platforms and online learning structures, as learners worldwide increasingly value the seamless integration of education into daily life. By enriching the possibilities for study–life balance, the global education landscape can evolve to not only meet the diverse needs of students, but also promote their holistic well-being and long-term academic gratification.

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## Conclusion

The investigation into student perceptions across Asian and European educational intentions reveals both common ground and divergences in the role of competencies affecting study-life balance. These variations may be deeply entrenched in the distinct historical contexts, cultural values, and pedagogical traditions that characterize each region. While Asian educational systems have traditionally emphasized rote learning, European pedagogy has leaned toward a more holistic approach, cultivating a range of competencies. However, as global education increasingly leans towards digital and online applications, we are witnessing a harmonization of perspectives regarding the integration of competencies and technology in education. This digital transformation has the potential to bridge long-standing divides, providing a universally accessible platform where diverse educational philosophies can converge and prosper. Nevertheless, it is crucial to acknowledge that regional characteristics will continue to be significant in shaping the specific aspects of educational experiences. These indigenous characteristics are not simply relics of the past, but active, living elements that define the identity of educational systems and influence how learners and educators perceive and engage with the concept of a balanced educational journey in a digital world.

This study's notable limitation is the disproportionate representation of Year 1 students among the survey respondents. As newly admitted students, they may possess a limited understanding of study-life balance, potentially influencing the validity of the findings. This concern is particularly relevant in Hypothesis 3, which required participants to evaluate their professors' research activities—a task that may be challenging for first-year students with limited exposure. We conducted data collection during the second semester to mitigate potential bias, ensuring that all participants had spent at least six months on campus before completing the questionnaire. However, future research should consider excluding first-year students from similar studies, as their limited experience may affect the data quality. Instead, graduate students who have accumulated substantial academic experience over 2–6 years should constitute the primary respondent group, as they are more likely to provide more informed responses. The use of closed-ended questionnaires presented a further limitation, though it did not significantly affect the overall outcomes, as the extensive examination and presentation of the variables in Tables 1–7 ensured the reliability of the findings. Further studies should take into account the use of open-ended questions as a means to supplement the quantitative data.

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ARTICLE

## Effect of Conscientiousness and COVID-19-Induced Job Stress on Organizational Citizenship Behavior Among Healthcare Professionals

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### ABSTRACT

Drawing upon the tenets of trait activation theory, the present study aimed to explore the moderating effect of COVID-19-induced job stress on the association between conscientiousness and organizational citizenship behavior (OCB) among healthcare professionals. Data for the study were collected from 379 healthcare professionals in India through a systematic random sampling technique. The results revealed a positive impact of conscientiousness on OCB. Moreover, COVID-19-induced stress negatively moderated the relationship between conscientiousness and OCB. The study findings have, thus, contributed to the budding research stream on the consequences of global pandemics on social institutions and individuals in general and extended the validity of trait activation theory assumptions in particular. The study provides valuable practical insights that may assist authorities in devising policies that could help encourage employees to display more of these pro-social behaviors in times of natural calamities when such behaviors are of utmost necessity.

### KEYWORDS

conscientiousness, COVID-19-induced stress, organizational citizenship behaviors, public hospitals

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## Introduction

COVID-19, which emerged in December 2019 and was subsequently declared a pandemic on 11<sup>th</sup> March 2020 by the World Health Organization, impacted over 704 million people across the globe, with over 7.0 million deaths being reported to date (Coronavirus Tracker, 2024). The abrupt beginning of the COVID-19 pandemic has raised a threat to all institutions in general and to healthcare institutions in particular (Peerzadah et al., 2023). In the midst of this calamity, healthcare workers discharged their frontline professional roles with newer responsibilities and vigor to boost pandemic operations (Durgun & Tayfun, 2023; Kua et al., 2022). However, various studies have revealed that healthcare workers, who took a keen role in battling COVID-19, have been exposed to work overburden, loneliness, and an elevated risk of infection (Israelowitz et al., 2020; Leon & Brock Baskin, 2022; Nainu et al., 2020), therefore risking them to psychological distress and other mental issues (Huang et al., 2023; Konstantinov et al., 2022; Zhu et al., 2020). A report from McKinsey and Company also affirmed that “healthcare providers face the humanitarian tragedy of the COVID-19 pandemic; they also face unprecedented stress (individually and institutionally) around the world” (Baur et al., 2020). Therefore, COVID-19-induced job stress has posed several challenges including high work standards and a tough environment (Zhang et al., 2020). These challenges have the potential to cause negative employee reactions including workplace cynicism, deviant behaviors, and even intent to turnover (Shrestha & Jena, 2021). This can also impact the exhibition of pro-social behaviors including organizational citizenship behavior (OCB), a significant source of healthcare service quality (Zhang et al., 2020). Since healthcare organizations are constantly facing the challenge of shortage in resources, be it manpower or infrastructure, ensuring employees’ exhibiting OCB is quite necessary for organizational effectiveness and efficiency (Basu et al., 2017), particularly for confronting the upshots of economic crisis and difficult contexts such as pandemics (Morales-Sánchez & Pasamar, 2019; Salas-Vallina et al., 2021).

In recent decades, immense interest has been witnessed among scholars to elicit the antecedents of OCB (Salas-Vallina et al., 2021; Sun & Yoon, 2022). Likewise, Big-Five personality traits have continued to remain in focus (Anitha et al., 2024; Ilies et al., 2009; Shaffer et al., 2015) and conscientiousness trait has been consistently reported as the best correlate of OCB (Chiaburu et al., 2011; Pletzer et al., 2021). However, there is scant literature available on the said relationship in the context of healthcare (Debusscher et al., 2017; Konovsky & Organ, 1996; Koomson, 2021; Kumar et al., 2009; Lv et al., 2012), particularly in non-western cultures. Owing to its linkages with self-control, compliance, social responsibility, and commitment, conscientiousness is regarded as the most relevant personality trait in the context of healthcare predominantly for combating public health emergency situations like pandemics (Starcevic & Janca, 2022). High conscientiousness appeared to have had an exceptional adaptive value during the pandemic (Aschwanden et al., 2021). Despite the aforementioned, the extant literature has also indicated that the association between conscientiousness and OCB may possibly be negative in some contexts,

thereby implying a high probability that boundary conditions impact the strength of relationship between conscientiousness and OCB (Meyer et al., 2009; Pletzer et al., 2021). Against this backdrop, the current study endeavored to assess the relationship between conscientiousness and OCB among healthcare professionals during COVID-19 pandemic. Further, it also attempted to explore the moderating effect of COVID-19-induced job stress on aforementioned relationship drawing upon the tenets of trait activation theory. According to the theory, personality traits are manifested in work behavior as a response to trait-relevant situational clues (Tett & Burnett, 2003). It further suggests that lack of trait activation diminishes trait-performance relationship (Judge & Zapata, 2015). Due to the changes in work context during pandemic, the most conscientious employees have been reported to experience higher levels of strain and low satisfaction, which is reverse of what was found in normal circumstances (Venkatesh et al., 2021). Hence, COVID-19-induced job stress, which is an extra organizational factor, may act as a barrier and weaken conscientiousness and OCB relationship among healthcare employees.

This study, therefore, offers a few contributions to the extant literature. First, it adds to studies that have analyzed conscientiousness–OCB relationships in social organizations including healthcare organizations, in a non-western cultural setting. Given that cultural differences can lead to varying behavioral outcomes at workplace, employees may demonstrate different levels of OCB directed at their co-workers or organization, particularly during the pandemic. Second, it contributes to the literature on personality traits and OCB by exploring the impact of a macro-level construct based on trait activation theory. To the best of our knowledge, no study has explored the moderating role of COVID-19-induced job stress on the aforementioned relationship. Third, this study gains relevance in the context of studies reporting the influence of COVID-19 in healthcare sector. In this regard, it highlights the effect of extra-organizational factors on performance of pro-social behaviors among healthcare professionals. By investigating these relationships, this study has addressed the scholarly calls for further investigations to gauge the impact of personality variables during such public health emergencies (Starcevic & Janca, 2022). Therefore, insights gained from this study are expected to prove beneficial for such countries where healthcare system is more fragile and prone to collapse during a calamity. Additionally, recognizing the role of conscientiousness in predicting positive extra-role behaviors during the COVID-19 pandemic can help public health authorities design personality-specific policies to effectively deliver services in future disease outbreaks.

## Literature Review and Hypotheses Development

### ***Organizational Citizenship Behavior***

Organizational citizenship behaviors refer to voluntary behaviors of employees that are not part of their contractual obligations and are seldom formally connected with organizational rewards but are useful in augmenting the overall effectiveness of organizations by encouraging a positive social and psychological environment (Organ, 1988; Rotundo & Sackett, 2002). Williams and Anderson (1991) categorized these

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pro-social behaviors into two broad forms, *OCBI* and *OCBO*. While former includes behaviors that provide direct immediate benefit to individuals and indirectly contribute to the organization, the latter includes behaviors that benefit organizations in general. Hence, employees displaying OCBs in any form are likely to add to organizational performance as these behaviors advance the flexibility required to perform job tasks through many unforeseen contingencies (Salas-Vallina et al., 2017; Smith et al, 1983).

### **Conscientiousness**

Conscientiousness represents the propensity to be well-organized, meticulous, thorough, trustworthy, dependable, persistent, capable of holding their impulses in control, committed to goals, and achievement-striving (Digman, 1990; Phipps et al., 2015). Studies have revealed that conscientious employees display more positive attitudes toward goals than their less conscientious counterparts (Conner & Abraham, 2001), and do their tasks thoroughly (Kelly et al., 2003). A highly conscientious individual tends to go beyond minimum requirements and is highly dedicated to work (Witt et al., 2002). In fact, conscientiousness trait is a key factor triggering motivational processes (Barrick et al., 2002), thereby leading to better performance.

### **Conscientiousness and OCB**

The extant literature on personality–OCB relationship has consistently supported conscientiousness as the best correlate of OCB (Anitha et al., 2024; Chiaburu et al, 2011; Organ & Ryan, 1995). Even the most recent meta-analytic studies (Pletzer et al., 2021; Zettler et al., 2020) have also corroborated this contention. Since strong work ethics and commitment to excellence are characteristic features of conscientious employees, hence they are inclined to engage in actions like offering assistance to co-workers, volunteering for additional responsibilities, and making extra efforts to meet organizational goals (King et al., 2005; Tripathi et al., 2023). Furthermore, owing to their characteristics of self-discipline and organization, they effectively manage their workload and look for opportunities to assist others. This way a conscientious employee can demonstrate and confirm a sense of identity as a competent person (Hogan & Holland, 2003). Additionally, conscientious employees approach their work in a proactive manner and look forward to potential issues, take initiative, and actively seek out chances to contribute in ways other than their assigned tasks. These characteristics fit well with extra-role behaviors like OCBs (Singh et al., 2017). Hence, one could interpret OCB as a manifestation of conscientiousness (Chiaburu et al., 2011). A highly conscientious employee has the natural tendency to go above and beyond their job obligations, and OCB provides them a platform to express this tendency either by providing benefit to a co-worker or to the organization (Chiaburu et al., 2011; Ilies et al., 2009; Raja & Johns, 2010).

Although most studies tend to generalize findings across various industries, there is a lack of healthcare-specific research that considers the unique challenges and work settings that healthcare professionals encounter (Debusscher et al., 2017;

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Koomson, 2021). Moreover, less research has been conducted in a non-western healthcare setting to understand the impact of conscientiousness on target-based OCBs (Koomson, 2021; Kumar et al., 2009; Lv et al., 2012). Given the paucity of resources and unprecedented heavy workload during the pandemic (Malik, 2022), OCB is a highly desirable behavior in healthcare settings (Leon & Brock Baskin, 2022). Promoting a culture of OCB within public hospitals is required because it may provide an opportunity to gain additional resources realized through extra-role behaviors (Bergeron et al., 2014). Similarly, many researchers have vouched for conscientiousness as having had an exceptional adaptive value during the pandemic (Aschwanden et al., 2021). In fact, conscientiousness has been considered as the most relevant personality trait for any public health emergency situation including pandemic (Starcevic & Janca, 2022). Several studies have investigated the linkages between conscientiousness and willingness to comply with various containment and mitigation measures (Aschwanden et al., 2021; Carvalho et al., 2020; Starcevic & Janca, 2022); however, there is a lack of attention towards studying the impact of this trait on extra-role organizational behaviors including OCBs. Consequently, it becomes more pertinent to gauge the influence of conscientiousness trait on OCB and its dimensions in public hospitals during COVID-19. Accordingly, we hypothesize that:

**Hypothesis 1 (H1):** Conscientiousness has a significant positive influence on OCB in public hospitals.

**Hypothesis 1a (H1a):** Conscientiousness has a significant positive influence on OCBI in public hospitals.

**Hypothesis 1b (H1b):** Conscientiousness has a significant positive influence on OCBO in public hospitals.

### ***Role of COVID-19-Induced Job Stress: A Trait Activation Theory Perspective***

Trait activation theory states that personality traits get expressed in work behavior as a response to trait-relevant situational clues, hence context or situation stimulates personality traits into action (Tett & Burnett, 2003). This theory focuses on individual–situation interaction and contends that behaviors are the outcome of such interactions (Lievens et al., 2006). Accordingly, employees are expected to gain intrinsic satisfaction from such work environment which permits an easy expression of their distinctive traits. It further suggests that lack of trait activation can diminish trait-performance relationship (Judge & Zapata, 2015; Tett & Burnett, 2003).

Recent studies (e.g., Ashiq et al., 2023; Durgun & Tayfun, 2023; Huang et al., 2023; Lima et al., 2020) revealed that healthcare employees who actively battle COVID-19 are prone to job stress, psychological distress, and other related mental issues. A number of reasons, for instance, extra workload, huge number of cases, dearth of certain medications, and feelings of being inadequately backed, have been cited in the literature that created stressful work environment (Durgun & Tayfun, 2023; Lima et al., 2020). Hence, within the hospital setting where such type of extra-organizational factor prevails, it is likely to have a detrimental impact

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on these voluntary employee behaviors through their conscientiousness trait. Although conscientiousness is the most relevant trait to face any health emergency, conscientious employees are also expected to prioritize their task performance over contextual performance in this unprecedented stressful context. It may act as a constraint and weaken the aforementioned relationship. When employees perceive a high level of COVID-19-induced job stress, the association between conscientiousness and any form of OCB is expected to weaken and vice versa. Moreover, numerous scholars (e.g., Hough & Oswald, 2008; Snyder & Ickes, 1985) have also argued that situational strength can moderate the relationship between personality and work outcomes. The meta-analytic reviews (Meyer et al., 2009; Pletzer et al., 2021) also indicated that association between conscientiousness and OCB could possibly be reverse or negative in some contexts and circumstances, thereby indicating a high possibility that contextual moderators impact the strength of relationship between conscientiousness and OCB. In an attempt to address this knowledge gap, this study examines the pandemic-induced job stress as one such contextual moderator because the unprecedented job demands due to this extra-organizational factor have taken a greater toll on more conscientious employees which has resulted in reversal impact on various outcomes including high job strain and low satisfaction (Venkatesh et al., 2021). Hence, parallel to these arguments, it is hypothesized:

**Hypothesis 2 (H2):** COVID-19-induced job stress moderates the relationship between conscientiousness and OCB such that effect of conscientiousness on OCB is low when COVID-19-induced job stress is high.

**Hypothesis 2a (H2a):** COVID-19-induced job stress moderates the relationship between conscientiousness and OCBI such that effect of conscientiousness on OCBI is low when COVID-19-induced job stress is high.

**Hypothesis 2b (H2b):** COVID-19-induced job stress moderates the relationship between conscientiousness and OCBO such that effect of conscientiousness on OCBO is low when COVID-19-induced job stress is high.

## Methodology

### *Sample and Procedure*

This study was conducted among healthcare employees working across different public hospitals in Jammu & Kashmir, India. The total population under study was 7,151 healthcare professionals. Yamane's (1967) formula was utilized to determine the optimum sample size (Table 1). Subsequently, using a systematic random sampling technique, every fifth individual in the available list of employees was approached. The questionnaires were distributed through both online and offline modes. The respondents were asked to fill out and return the questionnaire at their convenience. The entire data collection process was executed between May and September 2021.

**Table 1**  
*Calculation of Sample Size and Sampling Interval*

|  |   |
|--|---|
| Sample size ( <i>n</i> )                         | $\frac{N}{1 + N(e)^2}$ $= \frac{7151}{1 + 7151 (0.05)^2}$ $= 379$                     |
| Sampling interval ( <i>i</i> <sup>th</sup> term) | $n \div N * 100$ $= 379 \div 7151 * 100$ $= 5.29 \text{ or } 5 \text{ (rounded off)}$ |

Note. *N* = population size = 7151; *n* = sample size; *e* = Precision limit is 5% (convention within business, management, or social sciences research).

The demographic analysis revealed that our sample size of 379 respondents included 142 doctors, 169 nurses, and 68 paramedics. Moreover, our sample comprised of 42% males and 58% females; mostly respondents were in age group of 25–39 years (66.2%); most of them had completed their MD/MS/DNB/M.Sc. degrees (49.1%), and had below ten years of job tenure with their hospital (71.5%).

### **Measures**

The study has adopted well-established instruments to measure the constructs and all items were anchored to a 5-point Likert-type scale.

*Conscientiousness.* To assess conscientiousness among sample respondents, the study adopted items from Big Five Personality Inventory (John et al., 1991). The sample items include “I can do a thorough job” and “I persevere until the task is finished.”

*OCB.* The study assessed OCB via Lee & Allen’s (2002) scale. This scale consists of sixteen items, with eight items each for measuring OCBI and OCBO respectively. Sample items for OCBI include “I help others who have been absent”. Similarly, for OCBO “I attend functions that are not required but help the organizational image.”

*COVID-19-Induced Job Stress.* COVID-19-induced job stress was measured using adapted version of COVID-19-induced job stress scale (Montani & Staglianò, 2022) originally developed by Hochwarter et al. (2008) to measure stress induced by an extra-organizational stressful event. The sample items include “COVID-19 pandemic has caused me to work longer hours,” and “COVID-19 pandemic has made my work more demanding.”

### **Test for Common Method Bias**

To avoid common method bias (CMB), this study utilized certain procedural and statistical methods. Following Podsakoff et al. (2003), the anonymity and confidentiality of respondents were ensured and items were ordered to reduce priming effects while administering survey questionnaires. In addition, Harman’s single-factor test was executed using IBM SPSS to check this bias. Subsequently, after loading all the items onto a single factor, the total variance explained by the single factor was 29.435%, which is within the recommended threshold limit of 50% (Kock, 2015). Hence, it was concluded that CMB was not a serious issue in the data.

**Assessment of Normality**

The present study employed two most popular tests for assessing the normality of data, i.e., Kolmogorov-Smirnov with Lilliefors correction and Shapiro-Wilk tests (Steinskog et al., 2007; Thode, 2002). The results of both tests (Table 2) reported *p*-values for all the variables less than .05, which indicated that the data were not normally distributed. Consequently, PLS-SEM technique was used in the study because this modeling approach makes no distributional assumptions in computation of the model parameters (Wong, 2019).

**Table 2**  
*Tests of Normality Results*

|      | Kolmogorov–Smirnov <sup>a</sup> |           |                 | Shapiro–Wilk |           |                 |
|------|---------------------------------|-----------|-----------------|--------------|-----------|-----------------|
|      | Statistic                       | <i>df</i> | <i>p</i> -value | Statistic    | <i>df</i> | <i>p</i> -value |
| CJS  | 0.099                           | 379       | .000            | 0.959        | 379       | .000            |
| CONS | 0.097                           | 379       | .000            | 0.959        | 379       | .000            |
| OCBI | 0.097                           | 379       | .000            | 0.959        | 379       | .000            |
| OCBO | 0.097                           | 379       | .000            | 0.959        | 379       | .000            |
| OCB  | 0.085                           | 379       | .000            | 0.954        | 379       | .000            |

*Note.* <sup>a</sup> Lilliefors Significance Correction. CJS = COVID-19-induced job stress; CONS = conscientiousness; OCBI = organizational citizenship behavior towards individual; OCBO = organizational citizenship behavior towards organization; OCB = organizational citizenship behavior.

**Measurement Model Assessment**

To check for reliability and validity of scales, measurement model assessment was conducted using hierarchical component modeling (HCM) in SmartPLS 3 software. The conceptual model of the study comprised of two lower-order constructs viz., conscientiousness and COVID-19-induced job stress, and one higher-order construct viz., OCB. All these constructs were reflective in nature, therefore, following the recommendations of Hair et al. (2014), the measurement quality of these constructs was assessed. A disjoint two-stage approach was utilized to gauge the quality of OCB. Firstly, the measurement quality of lower-order components-OCBI and OCBO was assessed. Afterwards, an assessment of higher-order component-OCB was done on the relations between lower-order components and higher-order components (Becker et al., 2012; Peerzadah et al., 2024).

The initial lower-order model assessment revealed that the majority of factor loadings were above 0.7 threshold (Hair et al., 2018) while some loadings were below this cut-off. We deleted two items (Cov1 and Cov2) from COVID-19-induced job stress scale because loadings on these items were below 0.4 value and according to researchers (e.g., Hair et al., 2018, 2022), items with loadings below 0.4 should be deleted. Moreover, these experts have also suggested that items with loadings ranging between 0.4 and 0.7 can be retained only if average variance extracted (AVE) and composite reliability (CR) scores of constructs meet the recommended threshold values. There was no issue with CR score; however, the AVE score for

conscientiousness was below 0.50 value (Fornell & Larcker, 1981). Therefore, two items of conscientiousness scale (C4, C5) were also deleted. Consequentially, as shown in Table 3, Cronbach's alpha and CR values for all constructs exceeded the recommended level of 0.70 (Fornell & Larcker, 1981; Nunnally, 1975). Further, proof of convergent validity was provided by an acceptable level of AVE scores.

**Table 3**  
*Reliability and Convergent Validity of Constructs*

| Constructs | Items | Loadings | Cronbach's alpha | Composite reliability | Average variance extracted (AVE) |
|------------|-------|----------|------------------|-----------------------|----------------------------------|
| CONS       | C1    | 0.724    | 0.842            | 0.881                 | 0.518                            |
|            | C2    | 0.541    |                  |                       |                                  |
|            | C3    | 0.779    |                  |                       |                                  |
|            | C6    | 0.760    |                  |                       |                                  |
|            | C7    | 0.832    |                  |                       |                                  |
|            | C8    | 0.771    |                  |                       |                                  |
|            | C9    | 0.589    |                  |                       |                                  |
| CJS        | CJS3  | 0.500    | 0.769            | 0.856                 | 0.607                            |
|            | CJS4  | 0.891    |                  |                       |                                  |
|            | CJS5  | 0.820    |                  |                       |                                  |
|            | CJS6  | 0.843    |                  |                       |                                  |
| OCBI       | OCBI1 | 0.648    | 0.895            | 0.916                 | 0.580                            |
|            | OCBI2 | 0.800    |                  |                       |                                  |
|            | OCBI3 | 0.778    |                  |                       |                                  |
|            | OCBI4 | 0.813    |                  |                       |                                  |
|            | OCBI5 | 0.804    |                  |                       |                                  |
|            | OCBI6 | 0.839    |                  |                       |                                  |
|            | OCBI7 | 0.793    |                  |                       |                                  |
|            | OCBI8 | 0.580    |                  |                       |                                  |
| OCBO       | OCBO1 | 0.594    | 0.916            | 0.932                 | 0.634                            |
|            | OCBO2 | 0.803    |                  |                       |                                  |
|            | OCBO3 | 0.786    |                  |                       |                                  |
|            | OCBO4 | 0.804    |                  |                       |                                  |
|            | OCBO5 | 0.835    |                  |                       |                                  |
|            | OCBO6 | 0.854    |                  |                       |                                  |
|            | OCBO7 | 0.844    |                  |                       |                                  |
|            | OCBO8 | 0.822    |                  |                       |                                  |
| OCB        | OCBI  | 0.912    | 0.788            | 0.904                 | 0.825                            |
|            | OCBO  | 0.905    |                  |                       |                                  |

*Note.* CONS = conscientiousness; CJS = COVID-19-induced job stress; OCBI = organizational citizenship behavior towards individual; OCBO = organizational citizenship behavior towards organization; OCB = organizational citizenship behavior.

In addition, Heterotrait–Monotrait Ratio (HTMT) criterion was used to determine discriminant validity of each lower-order construct. It was found the HTMT scores for all the constructs (Table 4) were below threshold of 0.90 (Henseler et al., 2015), thereby evidencing their discriminant validity.

**Table 4**  
*Heterotrait–Monotrait Ratio (HTMT)—Stage I*

|      | CONS  | CJS   | OCBI  | OCBO |
|------|-------|-------|-------|------|
| CONS |       |       |       |      |
| CJS  | 0.140 |       |       |      |
| OCBI | 0.555 | 0.074 |       |      |
| OCBO | 0.527 | 0.085 | 0.704 |      |

*Note.* CONS = conscientiousness; CJS = COVID-19-induced job stress; OCBI = organizational citizenship behavior towards individual; OCBO = organizational citizenship behavior towards organization.

With respect to OCB–higher-order construct, we followed the same procedure that was utilized to examine the measurement quality of the lower-order constructs. Accordingly, factor loadings, Cronbach’s alpha, CR, AVE (Table 3), and discriminant validity (Table 5) were assessed. The results provided evidence for OCB being highly reliable and a valid construct.

**Table 5**  
*Heterotrait–Monotrait Ratio (HTMT)—Stage II*

|      | OCB   | CONS  | CJS |
|------|-------|-------|-----|
| OCB  |       |       |     |
| CONS | 0.649 |       |     |
| CJS  | 0.084 | 0.140 |     |

*Note.* OCB = organizational citizenship behavior; CONS = conscientiousness; CJS = COVID-19-induced job stress.

**Structural Model Assessment and Findings**

Since adequate support was obtained for the measurement model, we proceeded further with hypotheses testing which comes under structural model assessment. To test the proposed hypotheses, a non-parametric bootstrap procedure was run with 5,000 subsamples (Hair et al., 2018). Results revealed that conscientiousness was having a significant positive impact on OCB. The bias-corrected confidence interval without zero in between also indicated a significant relationship. Moreover, the  $f^2$  value of 0.40 also indicated a large effect size (Cohen, 1988). Hence, H1 was supported (Table 6). It was further revealed that conscientiousness has a significant positive impact on OCBI and OCBO. Similarly, the  $f^2$  values of 0.324 and 0.292 respectively indicated medium effect size (Cohen, 1988). Therefore, H1a and H1b were also supported.

**Table 6**  
*The Structural Model Estimation*

| Hypothesis              | Coefficient | <i>t</i> -<br>statistic | <i>p</i> -value | LLCI<br>(Bc) | ULCI<br>(Bc) | <i>f</i> <sup>2</sup><br>value | Decision         |
|-------------------------|-------------|-------------------------|-----------------|--------------|--------------|--------------------------------|------------------|
| H1. CONS → OCB          | 0.537       | 11.203                  | 0.000           | 0.449        | 0.608        | 0.400                          | Supported        |
| H1a. CONS → OCBI        | 0.497       | 10.918                  | 0.000           | 0.414        | 0.565        | 0.324                          | Supported        |
| H1b. CONS → OCBO        | 0.477       | 9.468                   | 0.000           | 0.384        | 0.549        | 0.292                          | Supported        |
| H2. CONS*CJS → OCB      | -0.145      | 2.199                   | 0.014           | -0.243       | -0.130       | 0.028                          | Supported        |
| H2a. CONS*CJS → OCBI    | -0.142      | 1.384                   | 0.083           | -0.162       | 0.298        | 0.018                          | Not<br>supported |
| H2b. CONS*CJS<br>→ OCBO | -0.151      | 2.190                   | 0.014           | -0.255       | -0.132       | 0.028                          | Supported        |

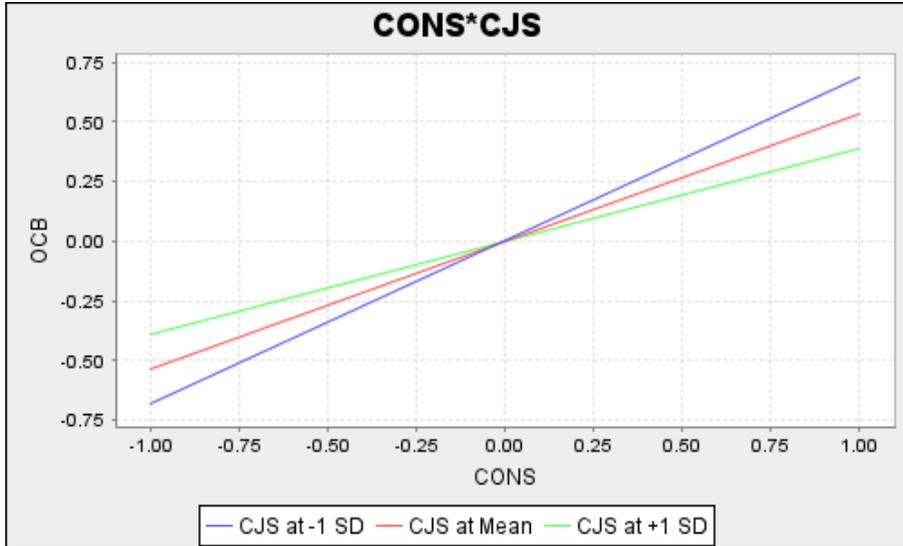
*Note.* LLCI = 95% Lower-level confidence interval; ULCI = 95% Upper-level confidence interval; Bc = bias corrected; CONS\*CJS = interaction term of conscientiousness and COVID-19-induced job stress.

The results of tests of the moderating effect of COVID-19-induced job stress on the relationship between conscientiousness and OCB revealed a significant negative moderation effect. Additionally, bias-corrected confidence interval without zero in between extended support to our hypothesis (H2). The *f*<sup>2</sup> value of 0.028 indicated a small effect size (Cohen, 1988). However, Aguinis et al. (2005) strongly suggested that moderators with even small effect size cannot be ignored. Therefore, H2 was also supported. Furthermore, the results also revealed a significant moderating effect of COVID-19-induced job stress on conscientiousness and OCBO relationship (H2b). While, in case of conscientiousness and OCBI, the results were found insignificant. Therefore, H2a was not supported in the study.

Figure 1 depicts the significant interaction effect of conscientiousness and COVID-19-induced job stress on OCB at mean and  $\pm 1$  standard deviation. At mean level, the effect of conscientiousness on OCB was positive, however, as COVID-19-induced job stress increased (+1 SD), the positive effect became less steep, indicating the positive effect weakened. Similarly, when COVID-19-induced job stress decreased (-1 SD), the positive effect got strengthened. Likewise, Figure 2 depicts the significant interaction effect on OCBO. It is also evident that as COVID-19-induced job stress increased (+1 SD), the positive effect of conscientiousness on OCBO became less steep and vice versa. Hence, in both cases, the nature of interaction was disordinal.

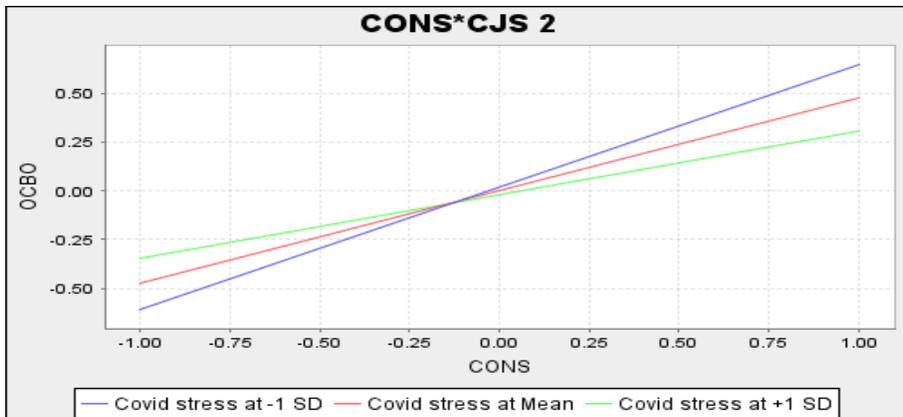
**Figure 1**

*Graphical Representation of Interaction Effect on Conscientiousness–OCB Relationship*



**Figure 2**

*Graphical Representation of Interaction Effect on Conscientiousness–OCBO Relationship*



Moreover, to determine the robustness of the structural model, coefficient of determination ( $R^2$ ) was calculated. The  $R^2$  value for OCB was .288 (Table 7), hence it can be stated that variation in endogenous construct described by all exogenous constructs was substantial (Cohen, 1988). However, the introduction of moderating effect in the model produces a change in the model. COVID-19-induced job stress interaction reflects a change in  $R^2$  value from .288 to .307. This change is important

in analyzing the interaction effect (Hair et al., 2022). The  $R^2$  change of .019 indicated that with the addition of interaction term (CONS×CJS), the  $R^2$  has changed about by 1.9% (additional variance). Similarly, the  $R^2$  value for OCBO was .230 (calculated in lower lower-order model), which was above Falk and Miller's (1992) recommended value of .10. After adding the moderating term, the  $R^2$  values changed from .230 to .251, thereby indicating additional variance of 2.1%. The present study also used a blindfolding procedure to confirm the predictive relevance of the model. As depicted in Table 7, the calculated Stone-Geisser's ( $Q^2$ ) value meets the prescribed condition for predictive relevance ( $Q^2 > 0$ ).

**Table 7**

*Coefficient of Determination ( $R^2$ ) and Predictive Relevance ( $Q^2$ )*

| Construct | $R^2$ (before adding moderator) | $R^2$ (after adding moderator) | $Q^2$ |
|-----------|---------------------------------|--------------------------------|-------|
| OCB       | .288                            | .307                           | .231  |
| OCBI      | .247                            | .261                           | .136  |
| OCBO      | .230                            | .251                           | .141  |

## Discussion

The current study has empirically tested the impact of conscientiousness on the display of OCB during pandemic among healthcare professionals in the Indian context. The results revealed that highly conscientious healthcare employees have a high tendency to get involved in positive extra-role behaviors even during pandemic. The results also revealed that conscientiousness trait had positively impacted both forms of OCB. This indicated that these conscientious employees tend to offer a helping hand to their colleagues and show genuine concern for their well-being even during hectic work schedules. Furthermore, they cared about the image and proper functioning of respective hospitals due to their basic tendencies of being well-organized, capable of holding impulses under control, committed to their goals, and achievement-striving. Hence, our findings have corroborated the extant studies (e.g., Chiaburu et al, 2011; Ilies et al., 2009; Kumar et al., 2009; Lv et al., 2012; Organ & Ryan, 1995; Pletzer et al., 2021; Zettler et al., 2020) which have found conscientiousness and OCB positively associated.

In an attempt to comprehend the role of boundary conditions on conscientiousness–OCB relationship, the current study explored COVID-19-induced job stress as the moderator. The results indicated that the interaction of conscientiousness and COVID-19-induced job stress negatively predicted employees' citizenship behaviors. In other words, COVID-19-induced job stress exerted a significant negative moderating influence on the aforementioned relationship, such that when COVID-19 induced job stress was more, conscientiousness–OCB relationship weakened and vice versa. Furthermore, the findings revealed that this relationship was negatively affected when the target of OCB was the organization. These findings are in line with assertion of trait activation theory which states that lack of trait activation can diminish trait-performance relationship (Judge & Zapata, 2015;

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Tett & Burnett, 2003). Hence, when the work environment was exceptionally stressful during the pandemic time, it did not allow for the easy expression of a healthcare worker's unique traits, due to which conscientiousness–OCB relationship got weakened. These findings are also supported by meta-analytic studies (e.g., Meyer et al., 2009; Pletzer et al., 2021) that have indicated the negative impact of certain circumstances or contexts on the aforementioned relationship. Similarly, Venkatesh et al.'s (2021) study has also revealed that the most conscientious employees of an organization have experienced higher levels of strain and low satisfaction because of the changes in work context during pandemic, which is reverse of what was found earlier. However, contrary to our assertion, this moderating effect was not significant in case of OCB directed towards individuals (OCBI). Since work orientation, self-control, discipline, and responsible behavior towards others are the key attributes of conscientious employees, they have been found highly adhere to prescribed guidelines and exhibited more hygiene behaviors during the pandemic (Aschwanden et al., 2020). These responsible behaviors might not have allowed this stressful work environment to significantly weaken their exhibition of helping behaviors toward their co-workers.

### **Theoretical Implications**

Following the extant literature, this study indicated a significant positive impact of conscientiousness trait among healthcare professionals, contributing largely towards their inclination to exhibit more OCBs. This study has added to the scant literature that has assessed the impact of personality factors for coping with such public health emergencies. Although several studies have investigated the linkages between conscientiousness and willingness to comply with various containment and mitigation measures (Aschwanden et al., 2021; Carvalho et al., 2020; Starcevic & Janca, 2022), there is a lack of interest in studying the influence of this trait on extra-role organizational behaviors including OCBs. By studying the aforementioned relationship in the Indian healthcare setting during the pandemic, the study has added to the pool of extant studies that have assessed the relationship in other contexts and cultures. Additionally, the findings have revealed a significant positive impact of conscientiousness on both forms of OCB, thereby addressing the concerns of whether OCB dimensions will have more or less similar antecedents in a non-western context (Daly et al., 2014). This study, moreover, advanced the literature by examining the conscientiousness–OCB relationship under boundary conditions of job stress induced by the COVID-19 pandemic. As aforementioned, COVID-19-induced job stress was incorporated as a moderator in the study model drawing upon Tett and Burnett's (2003) assumption of constraints in trait activation theory. Accordingly, the results revealed COVID-19-induced job stress as a significant constraint in work context that has diminished the activation of conscientiousness trait, thereby reducing its relevance to OCBs among healthcare employees. Hence, this study has extended its support to situation trait-relevance principle (Tett et al., 2021) and situation-strength effect (Judge & Zapata, 2015). On a broader level, this study has contributed to the domain of personality psychology by validating the assumptions of Trait Activation Theory in a novel context.

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## Practical Implications

The study results have several practical implications. The insights gained from the study can prove valuable for better healthcare management, particularly in crisis times like pandemic. Since the healthcare sector in India is already facing shortages of resources like inadequate staff, infrastructure, and medical supplies (Budhiraja et al., 2021; Malik, 2022), promoting a culture of OCB within healthcare institutions is required because it may provide an opportunity to gain additional resources realized through extra-role behaviors (Bergeron et al., 2014) and can also advance the flexibility required to carry out the tasks through many unforeseen contingencies (Smith et al., 1983). Towards that end, the study suggests the authorities give special consideration to conscientiousness during the selection process as the findings have found this trait as a strong predictor of OCB. In addition, it is also suggested to conduct such training sessions that aim at enhancing conscientiousness among the employees, to get more of such value-adding behaviors even in difficult situations. Since the findings have also revealed COVID-19-induced job stress weakening the positive impact of conscientiousness on OCB, the healthcare authorities, therefore, are suggested to organize stress management workshops at regular intervals to prepare these conscientious employees to face and manage extra-organizational stress factors like pandemic well in advance. Moreover, it is also suggested to regulate working hours for frontline healthcare professionals with an adequate period of physical and mental rest during a pandemic or similar kind of public health emergency to alleviate enormous stress levels. These suggestions may help in overcoming the detrimental impacts of highly stressful situations on the positive behaviors of these conscientious employees.

## Limitations and Future Research Avenues

The present study is also subject to certain limitations. The primary limitation pertains to design of the study: a cross-sectional research design was utilized instead of a longitudinal one, which limits the causality of the relationships. Although the data were collected from all three types of healthcare professionals, it was restricted to public hospitals in India. Another limitation pertains to potential risk of CMB. Notwithstanding that the study followed Podsakoff et al.'s (2003) procedural and statistical guidelines to avoid CMB, bias cannot be completely eliminated because the responses for all the constructs were self-reported. Furthermore, the present study has tested the predictive validity of general conscientiousness trait on OCB, while the narrower facets of this trait have not been taken into consideration. Facets refer to the components underlying the broad trait, for example, self-discipline, competence, dutifulness, and achievement-orientation in case of conscientiousness. Since facets can provide a more sophisticated comprehension of the role of a personality trait in applied settings (McAbee et al., 2014), hence future research can study the narrow facets instead of general conscientiousness trait. The present study, considering the unlikely recurrence of COVID-19 pandemic, urges future research to investigate how other stress-inducing factors like technological disruptions, work-life balance

issues, and job insecurity, moderate the conscientiousness–OCB relationship among healthcare employees across different cultures.

## Conclusions

The current study has contributed to the budding research stream on the consequences of global pandemics on social institutions and individuals. It has addressed the scholarly calls for further investigations to gauge the impact of personality variables during such public health emergencies. In fact, exploring COVID-19-induced job stress as the moderator of personality–OCB linkage is a novel contribution to the extant literature. Based on the findings, it is suggested that healthcare authorities should give special consideration to conscientiousness trait in various HR practices and simultaneously focus on organizing stress management workshops at regular intervals. This can result in getting more of such value-adding pro-social behaviors even during natural calamities like a pandemic.

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## RESEARCH NOTE

# Innovations in Human Resource Management: A Bibliometric Analysis

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### ABSTRACT

The present study investigates how research related to innovation is constructed using various intellectual frameworks as well as identifies pertinent references, authors, themes, and journals. To do so, we employed bibliometric methodologies to analyze 1,947 papers published between 2003 and 2023. We identified three publication periods that influenced the development of research in this sector. In addition, we found that technological improvements in human resource management (HRM) have led to a transformation of worldwide operations thus providing numerous advantages to human resources departments. This study emphasizes the influence of technology on HRM, encompassing electronic databases, electronic HRM, and digital platforms. In addition, it shows that a theoretical basis has emerged for the classification of innovative technologies in HRM, which is essential to the development of new conceptual models of HRM in the digital era. In general, the study contributes to the body of literature on HRM and provides guidance for future research.

### KEYWORDS

human resource management, E-HRM, innovation, technological system, bibliometric analysis

## Introduction

Innovation has become crucial for survival in the business world. A new kind of economy is emerging as a result of recent developments in international trade, particularly the growing importance of services, information, innovation, and

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human resource management (HRM). Creative HRM is described as “a designation for reform or innovation of current policies and procedures” (Crossan & Apaydin, 2010).

Employees may experience fear and anxiety about advances in technology, as they believe that these developments could cause them to lose their jobs. While some researchers argue that job opportunities will be eliminated, others suggest that although the advent of robots will lead to the loss of more employees and their replacement by robots, it will also result in the creation of new job opportunities (Lester, 2020). According to Foster and Harris (2005), managers have a significant role to play in this process. The way organizations handle the inherent tensions that managers face has an impact on the adoption and implementation of diversity policies. Management programs may increase chances for innovation, but it is the company’s employees who are recognized as the source of new ideas. People are responsible for developing ideas as well as proposing and implementing them. Human creativity is therefore considered the source of innovation (Jiang et al., 2012; Mumford, 2000).

Organizations may better prepare their workers to adapt to new conditions by implementing progressive human resources (HR) policies and practices that promote employee independence and professional growth (Agarwala, 2003). In this regard, the field of HRM contributes substantially in fostering an environment conducive to innovation in the workplace (Seeck & Diehl, 2017). HRM practices are important for determining whether an organization proposes innovations that are in line with its objectives by influencing and shaping the attitudes, conducts, and abilities of its employees (Seeck & Diehl, 2017). Numerous studies have shown that the best way for businesses to boost their innovative performance is to implement a system of coherent HRM practices (see, e.g., Jiménez-Jiménez & Sanz-Valle, 2005). Technology has also diminished the need for physical proximity inside businesses, allowing workers to collaborate across geographic distances and even operate remotely. In addition, technology has enabled businesses to recruit highly skilled workers, such as software engineers, from faraway locations (Agarwala, 2003).

The expertise and ability of employees are important for companies’ competitiveness and success. HR technology has progressed from paper and pencil to computers, electronic databases, and integration with company-wide systems. HR departments strive to improve the capabilities and experience of their organizations’ employees regarding technology (Wang et al., 2012). Technological inventions are driven by competition between companies and HRM, which has led to the spread of technology around the world (DeCarolis & Deeds 1999; Zhou et al., 2013).

With the invention of smartphones, technology has impacted all sectors of society, changing human lives through services related to financial health, student education, transit amenities, and online jobs, among others. This has significantly influenced HRM in organizations (Stone et al., 2015). However, the acceptance of these technological changes including in the HRM field remains the biggest challenge faced by organizations. Thus, it is the proper management of such aspects as innovations, reporting devices, and employee performance review, that is of utmost importance to organizations (Banerji, 2013).

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Technology has changed the business world, and its advancement has dramatically affected all aspects of business operations. Presently, organizations are unable to function smoothly and efficiently unless they use technology, which is also applied to HRM. The integration of technology into the field of HR plays an important role in the performance of employees and the implementation of changes to stay competitive. In other words, a company that manages HR effectively fosters its own ability to compete or stay relevant in the technological environment (Purohit, 2015).

HRM is set to become more widespread, leading to significant progress (Strohmeier, 2007). Technology in management-related fields has developed significantly, thus enabling companies and organizations to manage and handle their work more efficiently. This project is constantly improving (Bagga & Srivastava, 2014).

The present study explores and synthesizes the vast array of research literature about the intersection of technology and HRM. The study seeks to understand the impact of technological advancements on HRM practices as well as to identify the trends and patterns that have emerged in this field through a bibliometric analysis. This comprehensive literature review aims to map out the evolution of HRM in the context of technological integration, pinpointing how such advancements have enhanced organizational operations, employee management, and overall business strategies. The research provides a detailed historical perspective tracing progress from basic manual practices to the sophisticated, technology-driven processes that define modern HRM. It highlights the transformative impact of technology—from the introduction of electronic databases and enterprise systems to the latest innovations in electronic HRM (E-HRM) and digital platforms—which has not only streamlined HR operations but also enriched the strategic roles of HR departments in fostering innovation and driving organizational success. Furthermore, the study outlines the implications of these technological advances for HR practices, emphasizing the critical role of strategic HRM in leveraging technology for competitive advantage. It discusses challenges and opportunities in the realm of HR technology, suggesting that ongoing innovation and adaptation are essential for organizations to thrive in a rapidly changing business landscape. The overarching goal of this research is to deepen the understanding of technology's impact on HRM and guide future scholarly inquiry and practical applications in the field of HRM. The study's objectives are as follows:

- To analyze the role of technological advances in the development of HRM practices;
- To outline the implications of these technological advances for HR practices, underlining the critical role of strategic HRM in leveraging technology for competitive advantage;
- To highlight the transformative impact of technology on HR operations and the strategic roles of HR departments.

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## Literature Review

### *Overview of Innovation in HRM*

The post-globalization era has brought a period of trial and convergence as people learn to live in the new digital economy and adapt to the demands of the fourth industrial and technological revolution (Sánchez-Bayón & Aznar, 2021). This transformation necessitates decisions on how technology will be used to support and enhance the work of employees in pursuit of an organization's strategic objectives. These decisions are heavily influenced by developments in the field of HRM and technology (Schalk et al., 2013).

Although significant progress has been made in HRM and development, HR teams have yet to understand and implement these changes effectively. According to Busro (2018), new technological methods are one way to achieve this goal. Using computers, the Internet, and other forms of electronic communication, technology systems aim to streamline the process of accomplishing specific tasks.

HRM should prioritize information technology to accomplish the tasks effectively within an organization. HRM is a crucial asset for every firm, and technological advancements have helped boost HRM in many areas (Nazari et al., 2017). HRM relies heavily on knowledge, competence, and managerial decision-making, all of which function more efficiently within a framework of systems and technology (Softysik, 2003). The responsibility for managing HR has increased due to technology. Technology should be promoted because it improves performance management and strategic development in HR (Rana & Sharma, 2019). Technology has transformed the management of HR, especially in terms of gathering information on employees and altering the nature of work and working relationships. For example, many applications are used online, and HRM procedures mediated by technology have impacted individual interactions and HRM as a whole (Purohit, 2015).

Wright (1998) defines strategic HRM (SHRM) as "the pattern of planned HR deployments and activities intended to enable an organization to achieve its goals." The profession at large has emphasized the need to examine whether and how "systems" or "technology" in HR practices collectively help firms achieve strategic objectives, as opposed to focusing on individual HR practices. HR procedures that are "internally consistent and reinforcing to achieve some overarching results" constitute HR systems (Lepak et al., 2006).

An organization cannot survive or develop without gaining a competitive advantage over other competitors. The competitiveness of organizations can be attributed to the impact of HR. This has led to the rapid development of SHRM in recent years (Lefter et al., 2007). Manageability is instrumental in obtaining a competitive advantage. According to Lefter et al. (2007), the main objective of SHRM is to generate strategic capability to ensure that the organization has highly qualified, highly motivated employees to achieve a competitive advantage.

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Technology has already begun to dominate many formerly human-led tasks in science, engineering, business, and HR. Due to advancements in artificial intelligence, current generations have access to unprecedented technological capabilities. According to North (1992), artificial intelligence has largely supplanted human labor in most fields. This raises the question of the long-term strategic impact of technology on HRM practices in relation to employee well-being and job satisfaction. While this article discusses the technological advancements in HRM and their benefits for organizational performance and capabilities, it does not deeply investigate how these technologies affect the psychological and emotional aspects of the workforce over time. Understanding the correlation between the use of HRM technologies and employee well-being, job satisfaction, and work-life balance could provide insights into how technology can be leveraged to improve not only organizational outcomes but also employee happiness and retention.

### **Research Method**

Bibliometric techniques use a numerical methodology to quantify the characterization, assessment, and tracking of scholarly output. According to White and McCain (1998), its proponents, it is equipped with an arsenal of statistical and mathematical methods for analyzing and scanning a wide range of written works. The technique consists in using statistics to shed light on a mystery in science and highlight emerging patterns in a field.

### ***Unit of Analysis***

The unit of analysis for this bibliometric study was scholarly articles published in journals. These articles were chosen because they represent “certified knowledge” due to their rigorous peer-review process, which ensures the reliability of the results (Callon et al., 1991; Ramo-Rodríguez & Ruiz-Navarro, 2004). Other document types such as proceedings papers, news articles, and other non-peer-reviewed sources were excluded from the analysis.

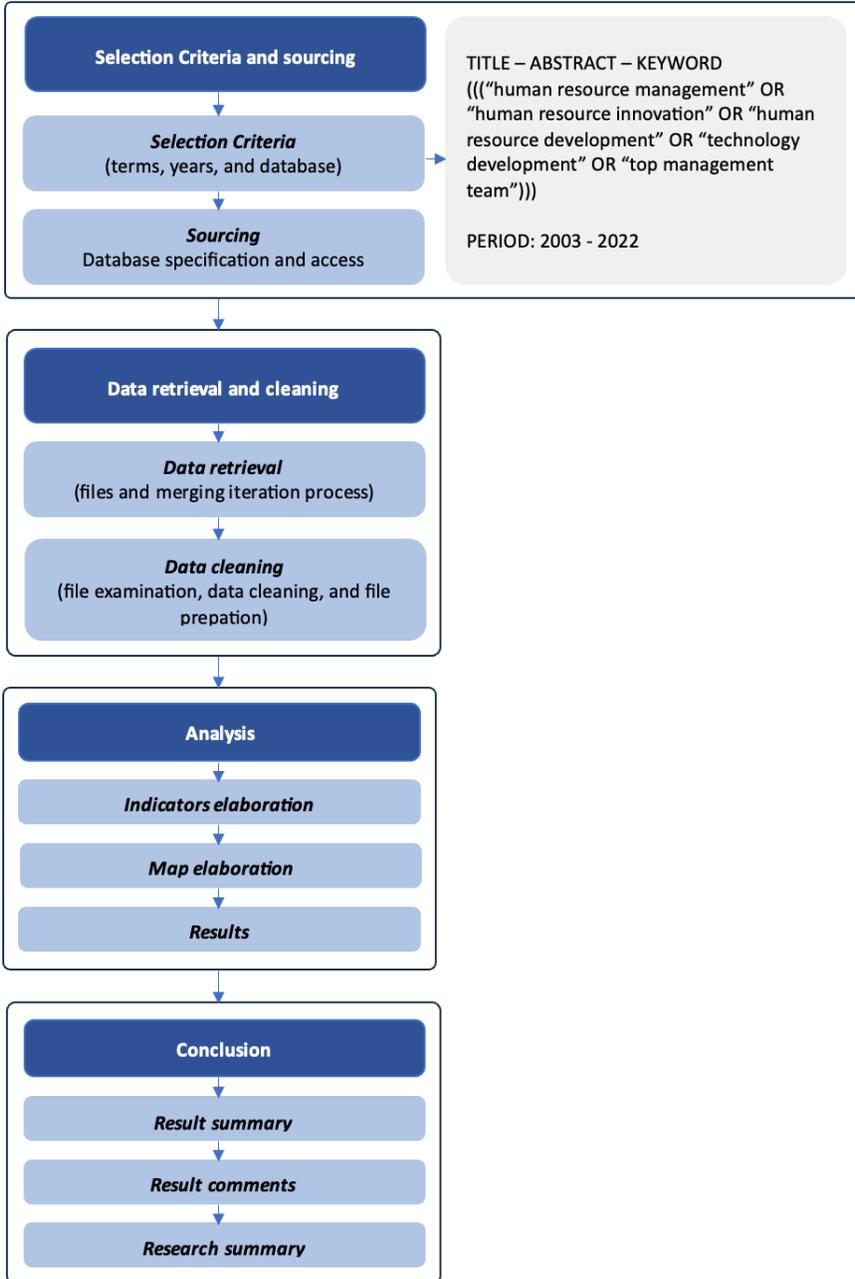
### ***Database Sourcing and Management***

The data for this study were obtained from the Scopus<sup>1</sup> database, which is known for its comprehensive coverage of scholarly literature across various disciplines, including sciences, medicine, economics, humanities, and arts. The search query included terms related to HRM and technology, such as “human resource management,” “human resource innovation,” “human resource development,” “technology development,” and “top management team” (Figure 1). The search was limited to titles, abstracts, and keywords to ensure relevance.

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<sup>1</sup> SCOPUS® is a trademark of Elsevier BV, registered in the U.S. and other countries. <https://www.scopus.com>

**Figure 1**  
*The Research Methodology Process Used in the Study*



Note. Developed by the authors.

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### **Data Retrieval and Cleaning**

The initial data retrieval involved downloading and merging files from the Scopus database. An iterative process was followed to guarantee the completeness and accuracy of the data. Data cleaning entailed examining the files for inconsistencies, standardizing capitalization, checking authors' initials, and removing duplicate references. This process ensured that the dataset was homogenous and suitable for analysis.

### **Analysis**

The cleaned dataset was analyzed using VOSviewer<sup>2</sup>, a powerful network analysis tool widely used in bibliometric studies (van Eck & Waltman 2010). VOSviewer enabled the clustering, mapping, and visualization of bibliometric networks. The analysis included various bibliometric techniques such as citation analysis, bibliographic coupling, co-citations, and co-authorship relationships. These techniques helped build networks comprising journals, researchers, and individual articles.

### **Indicators and Result Visualization**

Descriptive and relational bibliometric indicators were employed to provide sociodemographic context and visualize research trends. Indicators such as countries and years of publication were analyzed to understand the distribution and historical stages of research in the field. Keywords were analyzed to reveal how authors classify and connect their studies, highlighting under-analyzed concepts. Co-occurrence for authors and citations helped map research communities and intellectual frameworks. Lastly, visualization tools such as maps provided a clear picture of research activities and potential future directions.

### **Results**

The results of the analysis were summarized and visualized using various indicators and maps. The findings were discussed in the context of existing literature, and conclusions were drawn based on the results. The study's limitations were acknowledged, and potential lines of future inquiry were suggested. In following this methodology, the study aimed to provide a comprehensive overview of the prevalent topics, keywords, and patterns in the relevant literature on HRM and technology.

## **Discussion**

The articles we examined were published between 2003 and 2023 (Figure 2). We have identified the distinct periods to facilitate thorough examination and debate. During the initial period, from 2003 to 2006, only a limited number of publications were released, which is typical in a foundational period. In the second period, from 2007 to 2013, the average number of papers increased nearly tenfold. From 2014 to 2018, there was a noticeable rise in the number of articles, indicating that the field was in a stage of development. Despite a lower growth rate, a solid baseline of over 121

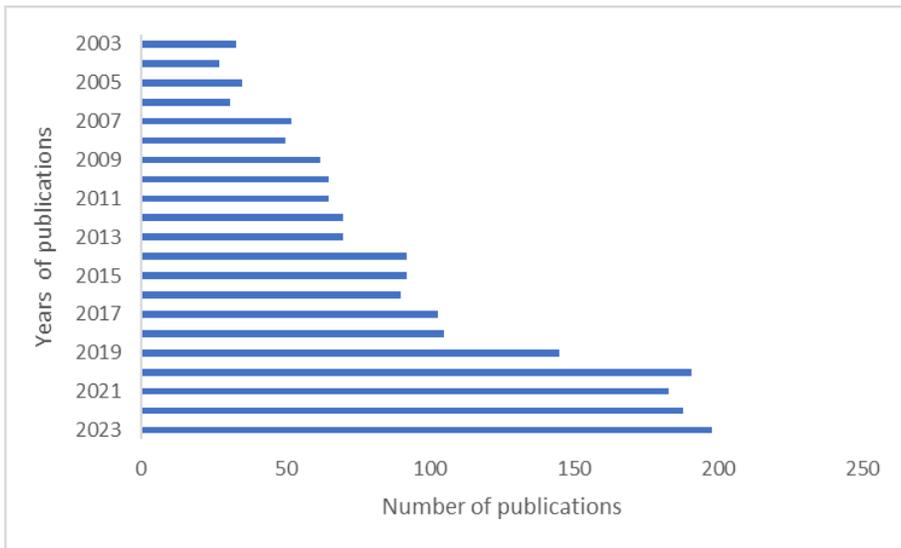
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<sup>2</sup> <https://www.vosviewer.com>

papers each year remained. Between 2019 and 2023, 904 articles were published, making it the period with the highest number of publications. The increase in the number of published papers indicates that the subject is progressing into a phase of advancement. Consequently, several avenues of research may be pursued, such as investigating novel interconnected subjects, delving deeper into previously neglected areas, or even seeking to tackle conventional problems.

**Figure 2**

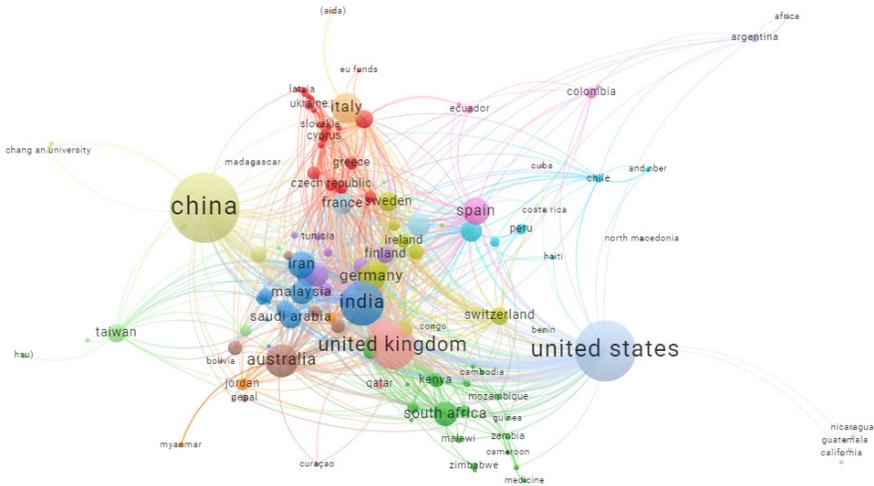
*Annual Number of Publications Related to Technology in HRM*



The analysis of the bibliometric data on the management of human resources in technology highlighted significant trends and patterns among the countries active in this research domain. The data indicated that the United Kingdom (381 links), the United States (351 links), and China (229 links) are at the forefront of research activities, emphasizing the critical role and importance of HRM in technology. These countries are leading not only in the number of research links but also in the number of citations their research receives, demonstrating their influence and contribution to the field. The high number of research links for these countries underscores their commitment to advancing knowledge and practices in HRM in technology-intensive environments.

Conversely, countries like Somalia, Kazakhstan, and Palestine exhibited minimal to no research links, indicating a stark disparity in research activity and engagement in this field. The data from VOSviewer further supported these findings by detailing the network connections and clusters of research activities, reinforcing the dominance of developed nations in contributing to and shaping the discourse on HRM in technology (Figure 3). This analysis underscores the need to increase support and collaboration to bridge the research gap between developed and developing nations and thus ensure a more inclusive and comprehensive understanding of HRM in technology.

**Figure 3**  
*The Network-Visualized Bibliometric Chart Based on Authorship Countries*



We analyzed 2,659 author keywords, focusing on those that appeared at least five times. “Human resource management” was a central keyword, occurring 56 times with 41 links, which suggested its pivotal role in the research network. This keyword was closely associated with “artificial intelligence” (59 occurrences, 53 links), “digital transformation” (18 occurrences, 11 links), and “sustainability” (42 occurrences, 16 links), reflecting the integration of technology and sustainable practices in HRM. Other significant keywords included “industry 4.0” (39 occurrences, 16 links), which pointed to technological advancements in HRM, and “blockchain” (31 occurrences, 36 links), showcasing its growing relevance in HRM research.

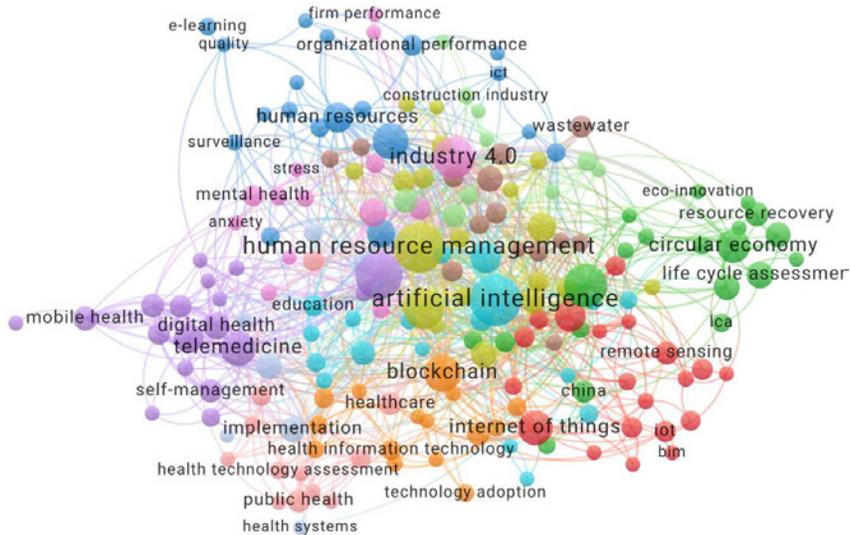
The network analysis revealed clusters of related keywords, such as Cluster 1, which included terms like “machine learning,” “internet of things,” and “project management,” illustrating the integration of advanced technologies in HRM. Cluster 2 featured keywords such as “sustainability,” “circular economy,” and “waste management,” emphasizing sustainable practices in HRM. Geographical keywords such as “Africa,” “Bangladesh,” “China,” and “South Africa” appeared multiple times and evidenced the global scope of HRM research. Keywords with high citation averages, like “nanotechnology” (36.4 average citations) and “systematic review” (21 average citations), indicated a significant impact. Our comprehensive analysis thus provided a holistic view of the current trends and themes in HRM innovation, highlighting the dynamic interplay between technology, sustainability, and HR practices.

We implemented strategies for HRM related to the adoption of new technologies, including providing staff with training on these tools to educate them about their advantages. The proliferation of mobile devices and the rise of information-rich applications in the workplace will help HRM in its mission to train the workforce to utilize technology effectively.

To visually represent the keyword network, we created a VOSviewer map (Figure 4).

**Figure 4**

*The Network-Visualized Bibliometric Chart Based on Author Keywords*



This map illustrates the connections and clusters formed by the keywords used in the literature. The VOSviewer map reveals several key clusters represented by different colors. The HRM cluster (blue), which includes keywords related to HR practices, employee training, and the integration of technology into HRM. The high frequency and numerous links indicate the central role of HRM in the literature, highlighting its importance in organizational innovation and efficiency. The Technology and Innovation cluster (red) is formed by keywords such as “technology,” “innovation,” and “information technology.” This cluster underscores the significant focus on technological advancements and their impact on business models and HR practices. The prominence of these keywords points to the transformative role of technology in modern organizations. Similarly, the Management and Training cluster (green), which encompasses keywords related to management practices and training programs, emphasizes the importance of effective managerial strategies and employee development, especially in the context of new technology adoption. It reflects the ongoing need for organizations to support and develop their workforce to maintain competitiveness and innovation. Lastly, the E-HRM and Information Management cluster (yellow) combines keywords such as “E-HRM” and “information management.” This cluster reflects the growing interest in electronic HRM systems and the efficient management of information within organizations. The connections between these keywords suggest a trend towards digital transformation in HR practices, with a view to enhancing strategic, tactical, and operational HR activities.

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In conclusion, the cluster structure in the literature revealed the interconnectedness of various themes such as HRM, technology, innovation, management, and information management. These clusters reflect the evolving landscape of organizational practices and the critical role of technology and innovation in driving efficiency and competitiveness.

Technology is an important facilitator of this cooperation. Digital transformation, in particular, has resulted in a significant surge in business model innovation, as evidenced by increased customer engagement and value, backed by new technological routes to market, and a reconfigured operational model of capabilities, resources, and partnerships.

Before 1960s, HR development activities in most countries were rudimentary. However, the potential for activities in HRM expanded and was eventually fully developed in organizations through the use of several HRM techniques (Bondarouk & Brewster, 2016; Jeenanunta et al., 2017). Although numerous case studies have demonstrated the benefits of HRM in a variety of settings, this article focuses on the central aspects of HRM (Strohmeier, 2007). As Adewoye and Obasan (2012) revealed, after the adoption and continuous upgrade of information technology, the efficiency of HR management processes, employee communication and engagement, and the roles and skills of HR managers saw a significant increase (Adewoye & Obasan, 2012). Having analyzed 30 research publications, Adewoye and Obasan (2012) pointed out the favorable connections between HRM systems and organizational innovation.

Process innovation, organizational structure innovation, and people innovation are all overlapping facets of innovation (Knight, 1967). HRM refers to the administration of a company's human capital resources, which comprise its workers' knowledge, skills, and capacities (Crook et al., 2011). Some scholars detail the shifts that have occurred, stressing the need for innovation not only in isolated projects but also in the design of the whole business operation (White & McCain, 1998). The European Union's economy relies on the expansion and creation of small and medium-sized businesses. Consequently, new ideas are crucial to a successful business. In addition, some evidence links the spread of innovation to the sustained growth of businesses (del Brío & Junquera, 2003; Laforet, 2011). Implementing and supporting new solutions in the organization is the next stage in the growth of innovation in an enterprise. Training, advancement in one's profession, the capacity to initiate projects, and innovation-related expertise are all crucial areas for improvement (Salavou et al., 2004; van de Vrande et al., 2009). Accordingly, important avenues for development include education, career promotion, initiative, and knowledge of innovation (Xerri et al., 2009).

It should be noted that innovation in the workplace requires not only a proactive mindset but also the ability to adapt quickly to new situations. Further, innovation management must be discussed at the institutional, team, and personal levels (De Jong & Den Hartog, 2010). Workplace innovation may be defined as both proactive management and the introduction of novel ideas, processes, products, and procedures from the ground up (De Jong & Den Hartog, 2010). A profitable company model and

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revenue may be generated and established via the innovative process of coming up with new ideas and altering existing concepts.

HRM in today's inventive industry necessitates an examination of emerging technology. Several writers have speculated and forecasted that by the year 2020, the most fundamental workforce skills and knowledge would be ones that we are not even aware of now. E-HRM can be defined as an approach to HRM that makes use of information technology to facilitate HR management tasks (Lengnick-Hall & Moritz, 2003). E-HRM was developed to promote strategic, tactical, and operational HR practices (Strohmeier, 2007). The use of E-HRM has a positive impact on the efficiency and efficacy of HRM procedures, which, in turn, benefits the organization's bottom line. Notably, the elimination of certain paper tasks helps improve the efficiency and effectiveness of HRM processes (Kaur, 2013).

## Conclusion

This study demonstrated that innovation in HRM is a well-established but still complex subject. An examination of the publications on innovation in HRM from 2003 to 2023 revealed that research on this topic can be divided into three stages: an initial phase from 2003 to 2006 characterized by the establishment of foundational work, a period of rapid expansion from 2007 to 2018, and a subsequent phase of ongoing development starting in 2019. This pattern corresponds to the typical developmental phases of study in a specific topic or field. It offers a solid foundation for developing new research and allows academics to investigate new subjects or connections and experiment with different frameworks. Once a particular subject reaches a point where it is considered resolved, intellectual principles serve as a foundation for conducting thorough investigations into undiscovered, interconnected subjects.

Technology plays a significant role in HRM. Technological advancements have revolutionized HRM practices, enhancing organizational operations, employee management, and overall business strategies. Our study used bibliometric analysis to map out the evolution of HRM in the context of technological integration. It revealed that the existing research underscores the transformative impact of technology, from the introduction of electronic databases and enterprise systems to the latest innovations in E-HRM and digital platforms. These advancements have not only streamlined HR operations but also enriched the strategic roles of HR departments in fostering innovation and driving organizational success. This study also outlined the implications of these technological advances for HR practices, notably the critical role of strategic HRM in leveraging technology for competitive advantage. It discussed the challenges and opportunities that lie ahead in the realm of HR technology, suggesting that ongoing innovation and adaptation are essential for organizations to thrive in a rapidly changing business landscape. The study concludes by suggesting avenues for future scholarly inquiry and practical applications in the field of HRM, focusing on understanding the correlation between the use of HRM technologies and employee well-being, job satisfaction, and work-life balance. This will provide insights into how technology can be leveraged

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to improve not only organizational outcomes but also employee happiness and retention. Our study explored how technology and innovation are shaping the field of HRM, their implications for organizational performance, and the strategic approaches that HR departments can adopt to leverage technology effectively. It addressed the impact of technology on HRM practices, the role of innovation in HR operations, and the strategic implications of using technology in HRM to improve organizational performance.

There are specific limitations in our investigation. While we analyzed contributions for the entire duration of the field's history, it would be beneficial to conduct a similar analysis for each of the indicated stages. This could offer an alternative viewpoint on the development of indicators and offer a distinct approach to comprehending potential patterns. Regarding the positioning of referenced publications, it would be valuable to utilize precise natural language programming, whenever it becomes accessible, to enhance the effectiveness of these strategies. Exploring a wider scope of innovation in HRM and conducting more assessments from a global perspective would be useful for the advancement of emerging technologies in this field.

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## BOOK REVIEW

# Jennifer Keating (2022). *On Arid Ground. Political Ecologies of Empire in Russian Central Asia*. Oxford University Press

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This volume offers a fascinating perspective on the imperial power's efforts to transform the environment of its periphery. While political ecology, understood as the study of political forces at work in environmental access, management, and transformation, has gained recognition over the last decades (Roberts, 2020), Keating's imaginative formulations of the book's objectives and approach might well excite even a specialized reader:

Exploring the connections between things, the assemblage of empire, one might say—for instance, how a camel in desert could be connected to fish in the Aral Sea, how sand was connected to tablecloths—exposes flows of labour, capital, ideas, ecology, and power, as well as revealing the entwined dependencies of histories that are more-than-human. (p. 27)

If a reader, indeed, expected a trans-scalar imaginative journey, the narrative might seem a bit more prosaic, but most illuminating and solidly corroborated by historical evidence, nonetheless. Setting out to explore the environmental imprint of Russian colonization and the impact of environmental challenges, J. Keating provides a comprehensive history of Russian presence in Turkestan over half a century, from the expansion to the disintegration of imperial control in Central Asia. Unlike traditional accounts of political, economic, or social development, however, Keating's narrative weaves together human and "more-than-human" aspects of history. Railroads provide an illustrative example. Traditional histories of imperial railroad construction typically emphasize planning, implementation, and subsequent utilization, framing railroads as symbols of imperial connectivity, which mark the empire's

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capacity to mobilize and transport military and economic resources. Critical histories, conversely, often highlight how new transportation networks render older routes and localities obsolete, leading to depopulation and decline. Keating's analysis integrates both perspectives while also providing notable details. On the one hand, "the railway exerted a transformative impact not simply on mobility, but on intellectual and religious currents, and on the development of new imagined geographies of interconnectedness within and beyond Central Asia" (p. 49). On the other hand, Keating traces a discursive evolution from early justifications centered on the "civilizing mission" to later arguments grounded in economic benefits as the rationale for infrastructure expansion. The "erasive implications" of new transportation systems are analyzed in the context of regional dynamics. For instance, the initial exclusion of Semirech'e from railroad construction plans was eventually overturned by arguments advocating for railroads that would integrate the region internally, rather than merely connecting the imperial center to its peripheries: "a picture less of the railway as a motor of cotton exports and more as a catalyst for the revitalization of local horticulture, viticulture, and sericulture" (p. 60). In this logic, Semirech'e had the potential to serve as a food supplier for the cotton-growing regions of Turkestan, thereby liberating arable land in those areas for the expansion of profitable cotton cultivation. This regional division of labor, it was argued, fostered a more integrated regional economy but simultaneously it also accelerated the advancement of monoculture, spurring the intensive environmental exploitation of cotton-producing areas. However, in her scaling down from imperial to regional perspective, Keating goes further and discusses railroads in their materiality. If we zoom in onto the objects that constitute the railroad—tracks, sleepers, switches, clearances, shelterbelts, bridges, stations, water towers, embankments, store houses, etc.—the whole range of new agents appear to be at play in specific locales, having specific (both planned and unintended) environmental effects.

While the language of actor-network theory is not used here, one might find resonances with the analyses of termites suddenly finding the treasure trove of wooden sleepers to feast on or ambitious water infrastructure projects leading to siltification, salinization, plant degradation, erosion, and eventual desertification (or re-desertification). Zooming out, though, Keating also explores how expertise gained by other empires such as France's projects in Africa was brought to bear in Russian terraforming in Central Asia as well as how Russian projects such as the Murgab imperial estate were showcased at international exhibitions, the venues of imperial competition and self-legitimation:

The value of improvement work could be as discursive as it was physical. Via representation, the [Murgab] estate became a legible expression of the transformative effects of empire: in the semi-desertified river delta, Russian management of terrain had seemingly resulted in environmental transformation, reservoirs full of water, cotton plantations, fruit orchards, and a modern town complete with settled, productive population. (p. 87)

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Keating discusses well-established tropes of imperial imagination, such as the portrayal of Asia as exotic and the depiction of imperial frontiers as sites of natural abundance ripe for exploitation. The broader framework of imperial projects involved efforts to “civilize” local populations, to introduce modern technological and scientific advancements into regional economies, and to channel local natural resources into global markets, thus positioning the empire as a transformative force. One of the interesting examples of how empire transformed the environment was the emergence of “heterotopic landscape,” particularly in Semirech’e, where the Russian settlements were described by visitors as indistinguishable from villages in central Russia. The sources of pride for both state officials and imperial visitors, however, reflected how isolated and alien imperial presence remained.

The problem of settlement, though, invited specific challenges to Russian imperial planning. While many argued that the settlement of Russian agricultural population in Central Asia would result in political and economic benefits: political presence would be reinforced and “unused” lands will ensure prosperity, these aspirations were cruelly undermined by several factors. First, the land was not “unused,” its designation as “empty” or “surplus” and allocation to colonists ignited violent clashes between local population and colonists, as akyns put it: “When the Russian comes, he will turn your lakes into roads, He will take stock of your land” (p. 124). Secondly, mass colonization of peasants required large scale programs of educating them in local agricultural practices. However, despite significant efforts of the state, many peasants who migrated to Central Asia were not necessarily apt for acquiring new competences and adjusting to local circumstances. Many ended up impoverished and disenchanting, manning the ranks of urban proletariat:

Rather than a source of imperial stability and consolidation, agrarian settlement had the potential to be a major force of local volatility, and was a significant driver of the physical unrest that erupted in the summer of 1916. (p.130)

Thus, Keating shows how the familiar divisions of center–periphery, settler and indigenous communities, need to be complemented with regional and local divisions such as cotton-producing areas and food-producing areas, territories with traditionally sedentary populations and territories with nomadic populations, urban and rural divisions.

While many aspects of Russian colonization, from conquest to migration and ensuing revolts against Russian imperialism, are covered in detail, the second objective—exploring the impact of environmental challenges—seems to remain in the background. If “climate and landscape were seen as potentially threatening to Russian authority” (p. 20), a reader is presented with very few possible impacts of this threat on governance. One response could be described as imperial “doubling down” as was the case in Murgab estate, which despite all regional, national, and international parading as a “shining example” of progress, was in need of constant flow of investment, structural repairs, and central oversight:

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Crucially, degradation extended to the larger river system: erosion, salinity, disease, and reduced river volume did not vanish at the estate legal boundaries ... ecological costs weighed on the wider legitimacy of the imperial enterprise. (p. 92)

The other response can be summed up in one word: corruption. From the local officials shaking down the local population to embezzlement and grafting throughout the imperial hierarchy. However, Keating also sketches some possibilities such as the growth of civil society in Central Asia and its efforts to bridge the local population and the colonists, academic expertise and local knowledge, imperial interests and local development. Several examples were given such as public lectures, publication of local news media, but also local exhibitions, which “not only mobilized society by bringing people together, it actively created society, cutting across the usually sharply delineated lines drawn between local inhabitants and Russian settlers” (p. 153).

It should also be mentioned that this volume is well-illustrated and would constitute a valuable addition to the collections of institutions focusing on Central Asian studies.

## References

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## INSTRUCTION FOR AUTHORS

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| Act                           | <i>Mental Health Systems Act</i> , 41 U.S.C. § 9403 (1988).  |
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