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CONTENIDO

Presentación. *Raima Rujano* 327

TRABAJO SOCIAL

Eficacia de las intervenciones basadas en mindfulness en el bienestar de profesionales del trabajo social de servicios sociales: una revisión sistemática

Effectiveness of mindfulness-based interventions on the well-being of social work practitioners in social services: a systematic review

Ramon Rosaleny Castell, Mercedes Botija Yagüe, Ausiàs Cebolla Martí, Xavier Uceda Maza . . . 329

Mecanismos de apoyo para trabajadores de servicios sociales: caminos hacia un cuidado sostenible para clientes que viven con demencia

Support mechanisms for social service workers: pathways to sustainable care for clients living with dementia

Lukáš Stárek 353

Distintas visiones económicas de la gestión de comunidades vulnerables desde la perspectiva del trabajo social

Different economic visions of the management of vulnerable communities from a social work perspective

Oksana Marchenko, Anatolii Postol, Kateryna Pylypenko, Yuliia Ovsienko, Yelyzaveta Pukas . . 369

Estrategias de intervención social orientadas al desarrollo de economías sostenibles en zonas turísticas: Un estudio de caso

Social intervention strategies oriented to the development of sustainable economies in tourist areas: A case study

Oksana Marchenko, Nataliia Runcheva, Natalia Babko, Evgeniy Podakov, Maryna Salnikova . 382

CULTURA ORGANIZACIONAL

Cultura organizacional y bienestar profesional: El papel mediador de la congruencia de valores

Organizational culture and professional well-being: The mediating role of value congruence

Elena Voitenko, Ivan Pustovalov, Viktoriia Staryk, Inna Lapchenko, Nataliia Hordiienko 394

La importancia social de la formación continua de los funcionarios públicos para maximizar la gobernanza y la gobernabilidad democrática. Percepciones y debates

The social importance of continuous training of public officials to maximize governance and democratic governance. Perceptions and debates

Regina Andriukaitiene, Olena Dzhafarova, Kateryna Rudoi 411

El papel mediador de las habilidades comunicativas en la relación entre el emprendimiento multidimensional y las habilidades personales

The mediating role of communication skills in the relationship between multidimensional entrepreneurship and personal skills

Aboutaleb Shahi Khiavlo, Mohammad Rouhi Eisalou, Mohammad Kheirandish, Behnam Azadi . . . 421

La interacción entre valores socioculturales, comportamiento y bienestar: Rasgos destacados de la inteligencia social

The interplay between sociocultural values, behavior and well-being: salient traits of social intelligence

Elisabeta Butoi, Nicoleta Ileana Sălcudean 431

La influencia de las características interculturales y psicológicas de los participantes en la negociación en el estilo de comunicación y la toma de decisiones (estudios de casos de procesos de negociación)

The influence of intercultural and psychological features of negotiation participants on communication style and decision-making (case studies of negotiation processes)

Tatiana Zhukova, Yana Uspenskaya, Daria Sukhorukova, Yulia Drobotenko, Natalia Nazarova, Svetlana Golerova 448

El teletrabajo y su impacto en la satisfacción laboral en los empleados recién egresados de estudios universitarios de pregrado

Teleworking and its impact on job satisfaction in employees who recently graduated from undergraduate university studies

Mayra Alejandra García Pecina 464

FAMILIA

Los valores familiares de los jóvenes rusos en el contexto de los cambios sistémicos globales

Family values of Russian youth in the context of global systemic changes

Maria Eflova, Regina Garipova, Olga Maximova 473

EDUCACIÓN Y UNIVERSIDAD

Asuntos problemáticos de la educación a distancia desde la perspectiva de la teoría crítica de la sociedad. Ideología, alienación y poder en contextos de aprendizaje

Problematic issues in distance education from the perspective of critical theory of society. Ideology, alienation, and power in learning contexts

Olena Kravchenko, Lesia Levchenko, Nataliia Yukhymenko, Oleksandr Ratsul, Yulia Bilyk . . . 485

Experiencia de colaboración social y pedagógica en la formación de la identidad nacional rusa entre los estudiantes

Experience of social and pedagogical partnership in the formation of the Russian national identity among students

Olga Goncharenko, Svetlana Semenkov, Lyudmila Bochantseva 494

Sinergizar el rendimiento académico con la competencia comunicativa y la adopción de tecnología

Synergizing academic achievement with communicative competence and technology adoption

Tengku Shahrana, Mokhtarrudin Ahmad, Nurafni Rubiyanti 502

El rol de la educación superior en la formación ciudadana y la conciencia democrática. El caso de Ucrania

The role of higher education in citizenship training and democratic awareness. The case of Ukraine

Nataliia Potapchuk, Oleg Yatsyshin, Yaroslav Haleta, Olena Habelko, Tetiana Stritiyevych . . . 519

Saberes ancestrales agroecológicos en el Chocó-Colombia

Agroecological ancestral knowledge in Chocó-Colombia

Narlisbeth Martínez Borja 528

DERECHOS Y JUSTICIA SOCIAL**Salvaguardar los derechos de la mujer: el viaje jurídico poscolonial de la india hacia la justicia de género**

Safeguarding women's rights: india's post-colonial legal journey towards gender justice

Aneesh Vijayan Pillai, Nivedhitha Vijayakumar, Shilpa Sharma, Kaumudhi Challa 547**Garantizar la justicia social en la aplicación de la ley y las actividades judiciales: análisis de las normas internacionales y la práctica nacional**

Ensuring social justice in law enforcement and judicial activities: analysis of international standards and national practices

Andrii Tomchuk, Olha Koshova, Vitalii Kharchenko, Serhii Dmytriiev, Yevhenii Kaluhin 561**Procesos de transformación en el ámbito social bajo la ley marcial: retos y oportunidades**

Transformation processes in the social sphere under martial law: challenges and opportunities

Iryna Verkhovod, Oleksii Sysoiev, Oksana Marukhlenko, Yaroslav Haleta, Nataliia Polishchuk 570**Actitudes de los atletas con discapacidad auditiva hacia los derechos humanos en el deporte**

Attitudes of hearing-impaired athletes towards human rights in sports

İbrahim Dalbudak 583**REPRESENTACIONES Y NARRATIVAS SOCIOCULTURALES EN CONTEXTOS CONTEMPORÁNEOS****El acento ucraniano de la crisis migratoria europea en el contexto de la filosofía de la marginalidad**

The ukrainian accent of the european migration crisis in the context of the philosophy of marginality

Roman Oleksenko, Mykolas Deikus, Jolita Vveinhardt 596**Representaciones sociales de la guerra en Ucrania en la narrativa de diversos medios de comunicación. Análisis crítico del discurso político**

Social representations of the war in Ukraine in the narrative of various media.

Critical analysis of political discourse

Oksana Babak, Natalia Chernysh, Serhii Piddubnyi, Svitlana Chernik, Nataliia Yukhymenko 612**La imagen de la maternidad como fenómeno sociocultural: un estudio cualitativo- cuantitativo de la obra de Maya Angelou**

The image of motherhood as a socio-cultural phenomenon: a qualitative-quantitative study of Maya Angelou's works

Gulsaira Ibrahimova, Kanykei Kalieva, Makhabat Alishova, Zhyldyz Chymanova, Aiida Asylbekova 622**Recensión** 632**Normas para los autores** 634

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PRESENTACIÓN

La revista **Interacción y Perspectiva**, órgano de difusión científica del Centro de Investigaciones de Trabajo Social de la Universidad del Zulia, en esta ocasión presenta su Volumen 15, Número 2, correspondiente al año 2025. Este número reúne un conjunto de 21 artículos cuidadosamente seleccionados, organizados en torno a áreas temáticas clave que reflejan los desafíos contemporáneos y las transformaciones sociales que impactan el campo del trabajo social y las ciencias sociales en general. Esta edición no solo reafirma el compromiso de la revista con la excelencia académica, sino que también ofrece una plataforma para el análisis crítico, la reflexión interdisciplinaria y la construcción de nuevas perspectivas sobre problemáticas sociales urgentes.

En este volumen, se destacan investigaciones que abordan desde un enfoque riguroso e innovador temas relacionados con el bienestar profesional, la cultura organizacional, la justicia social, las dinámicas familiares, la educación y las narrativas socioculturales en contextos contemporáneos. Cada contribución refleja un esfuerzo por comprender, interpretar y proponer soluciones a las complejidades sociales que enfrentan las comunidades y los profesionales del trabajo social en diversos contextos. La diversidad de enfoques y metodologías empleadas en los artículos es un testimonio del dinamismo y la amplitud del campo, permitiendo un diálogo fructífero entre distintas disciplinas y perspectivas.

Uno de los temas centrales de esta edición es el bienestar de los profesionales del trabajo social, un colectivo especialmente vulnerable a los efectos del estrés, el burnout y la fatiga empática. En este sentido, el artículo sobre la eficacia de las intervenciones basadas en mindfulness destaca cómo estas estrategias pueden transformar positivamente la práctica profesional, mejorando la autocompasión y la satisfacción laboral. Este enfoque no solo promueve la salud mental de los trabajadores sociales, sino que también abre nuevas posibilidades para fortalecer la ética y la calidad de los servicios sociales.

Otro aporte significativo se encuentra en el análisis de los mecanismos de apoyo para trabajadores de servicios sociales que atienden a personas con demencia. Este artículo subraya la necesidad de crear entornos laborales sostenibles que incluyan supervisión, formación continua y tecnologías modernas, elementos esenciales para garantizar una atención de calidad y prevenir el agotamiento profesional. Este tipo de investigaciones no solo enriquece el conocimiento sobre el trabajo social, sino que también tiene implicaciones prácticas para la mejora de las políticas públicas y las condiciones laborales de estos profesionales.

En el ámbito de la gestión comunitaria, el estudio sobre visiones económicas alternativas en la gestión de comunidades vulnerables ofrece una perspectiva innovadora sobre cómo la economía solidaria y el trabajo comunitario pueden integrarse para promover el desarrollo sostenible. Este artículo reafirma el papel del trabajo social como un puente epistemológico que conecta las realidades locales con estrategias globales, contribuyendo a la formulación de políticas públicas inclusivas y adaptadas a las necesidades de las comunidades más desfavorecidas.

La relación entre la cultura organizacional y el bienestar profesional es otro tema abordado en esta edición, destacándose el papel mediador de la congruencia de valores entre los empleados y las organizaciones. Este enfoque pone de manifiesto cómo un entorno organizacional alineado con los valores personales puede fomentar la seguridad psicológica, la satisfacción laboral y el desarrollo profesional, elementos clave para el bienestar y la productividad en el ámbito laboral.

En el campo de la educación y la formación, los artículos incluidos en este número exploran temas como la importancia de la formación continua de los funcionarios públicos para fortalecer la gobernanza democrática, el impacto del teletrabajo en la satisfacción laboral de los jóvenes profesionales y los desafíos de la educación a distancia desde una perspectiva crítica. Estas investigaciones no solo enriquecen el debate académico, sino que también ofrecen herramientas para enfrentar los retos educativos y laborales en un mundo cada vez más digitalizado y dinámico.

Finalmente, esta edición incluye estudios que abordan cuestiones de gran relevancia sociocultural, como los derechos humanos en el deporte para personas con discapacidad auditiva y las narrativas mediáticas sobre la guerra en Ucrania. Estos artículos no solo amplían nuestra comprensión de las dinámicas culturales y políticas contemporáneas, sino que también destacan la importancia de un enfoque crítico e inclusivo en el análisis de los fenómenos sociales.

En conjunto, los artículos presentados en este volumen reafirman el compromiso de la revista **Interacción y Perspectiva** con la promoción del conocimiento científico y la construcción de soluciones innovadoras para los desafíos sociales actuales. Este número no solo es una invitación a reflexionar sobre las complejidades del mundo contemporáneo, sino también un llamado a la acción para transformar la realidad social desde el trabajo social y las ciencias sociales. Confiamos en que esta edición será de gran interés y utilidad para investigadores, profesionales y estudiantes comprometidos con la justicia social y el bienestar colectivo.

Raima Rujano

Editora

Directora del Centro de Investigaciones de Trabajo Social

Eficacia de las intervenciones basadas en mindfulness en el bienestar de profesionales del trabajo social de servicios sociales: una revisión sistemática

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Resumen. Este artículo presenta una revisión sistemática que evalúa la eficacia de las intervenciones basadas en mindfulness (IBM) en el bienestar de trabajadoras sociales, un colectivo especialmente vulnerable a altos niveles de estrés, ansiedad, burnout y fatiga empática. A través de una búsqueda en bases de datos académicas, se seleccionaron siete estudios que examinan los efectos de las IBM en trabajadoras sociales del ámbito de los servicios sociales. Los resultados muestran que las IBM son efectivas para reducir el estrés y el burnout, y mejorar la autocompasión y la satisfacción por compasión, variables críticas para el bienestar emocional y la calidad de la práctica profesional. Sin embargo, se identificaron limitaciones en los estudios revisados, tales como la falta de grupos control robustos, tamaños de muestra reducidos y la ausencia de seguimientos a largo plazo. Aunque los hallazgos son prometedores, se recomienda realizar más investigaciones con diseños rigurosos para confirmar los beneficios de las IBM en este contexto. Las IBM ofrecen un potencial importante para promover el bienestar y mejorar la ética profesional en el trabajo social, abriendo nuevas líneas de intervención en este campo.

Palabras clave: bienestar, mindfulness, burnout, revisión bibliográfica, trabajo social.

Effectiveness of mindfulness-based interventions on the well-being of social work practitioners in social services: a systematic review

Abstract. This article presents a systematic review evaluating the effectiveness of mindfulness-based interventions (MBI) on the well-being of social workers, a group particularly vulnerable to high levels of stress, anxiety, burnout and empathy fatigue. Through a search of academic databases, seven studies were selected that examine the effects of MBM on social workers in the social services field. The results show that IBMs are effective in reducing stress and burnout, and improving self-compassion and compassion satisfaction, critical variables for emotional well-being and quality of professional practice. However, limitations were identified in the reviewed studies, such as the lack of robust control groups, small sample sizes and the absence of long-term follow-up. Although the findings are promising, further research with rigorous designs is recommended to confirm the benefits of CBIs in this context. IBMs offer significant potential for promoting well-being and improving professional ethics in social work, opening up new lines of intervention in this field.

Keywords: wellbeing, mindfulness, burnout, literature review, social work.

INTRODUCCIÓN

Las/os trabajadoras/es sociales se constituyen como un agente fundamental en la provisión de bienestar a la ciudadanía (IFSW, 2021). En cambio, en la literatura del trabajo social existe una evidencia creciente de que las profesionales del trabajo social presentan un mayor riesgo de sufrir malestar expresado en forma de estrés, ansiedad, depresión, burnout y/o fatiga empática (Consejo General de Trabajo Social [CGTS] 2019, 2022; Romero, Elboj y Iñiguez, 2020).

Se puede suponer que debido a la COVID19 estos problemas han empeorado y así parece que se manifiesta en el “IV informe sobre los servicios sociales en España y la profesión del Trabajo Social” (CGTS, 2022) en el cual se muestra que el 25% trabajadoras sociales experimenta altos niveles de ansiedad y el 27% algún grado de burnout. Las trabajadoras sociales han reconocido sentirse abrumadas por la situación y han sufrido un gran impacto y vulnerabilidad en su salud física y mental desde el inicio del periodo de emergencia sanitaria (Instituto Nacional de Administración Pública (INAP), 2020; Muñoz-Moreno et al., 2020). Además, según un estudio llevado a cabo por un grupo de académicos del trabajo social en asociación con la Federación Internacional de Trabajo Social (Banks et al., 2020), la pandemia también ha aumentado cuantitativa y cualitativamente los desafíos éticos.

El problema del malestar laboral en las trabajadoras sociales es de gran importancia debido a sus posibles implicaciones en la calidad del servicio prestado (Kotera, Green y Sheffield, 2020). No obstante, hasta la fecha, parece que las administraciones y los sistemas de protección social en España han olvidado tener en cuenta el bienestar de las propias trabajadoras sociales y no se han articulado intervenciones o propuestas prácticas para promover su cuidado (Muñoz-Moreno et al. 2020; INAP, 2020). Asimismo, ha habido una escasez de estudios que aborden específicamente for-

mas de ayudar a las profesionales del trabajo social a cuidar su salud laboral y a abordar los desafíos éticos a los que se enfrentan (Banks et al., 2020), sobre todo, si se considera el importante aumento de necesidades sociales urgentes a las que han atendido durante y después de la pandemia (Calvo y Botija, 2020; Canet y Caravantes, 2020).

Por todo el que se ha mencionado anteriormente, existe una creciente necesidad e interés al buscar, implementar y validar nuevas estrategias de intervención eficaces para evitar que la situación de vulnerabilidad coyuntural en la salud laboral de las trabajadoras sociales se cronifique y para promover su bienestar y mejorar su práctica ética de cuidado (Muñoz-Moreno et al. 2020; CGTS, 2022;), tal y como ya se ha hecho con otros profesionales de ayuda del ámbito de la enfermería, medicina y la psicología obteniendo resultados positivos (Almeida et al., 2020; Kinman Teoh y Harriss, 2020; Cebolla et al., 2022).

Las intervenciones basadas en mindfulness (IBM) son una manera de mejorar la salud laboral y apoyar al desarrollo profesional de las Trabajadoras Sociales que muestra una creciente evidencia científica en la disciplina del Trabajo Social en el ámbito internacional (Tan y Keng ,2020; Beer et al., 2020; Hick, 2009) siendo muy escasa la evidencia en el estado español (Moñivas, García-Diex y García-De-Silva, 2012).

Existe una gran necesidad e interés en que los y las investigadores/as del trabajo social participen con rigor en este importante campo de investigación dado el ajuste natural entre la filosofía práctica general de la profesión del trabajo social con el mindfulness y otras prácticas contemplativas, (Garland, 2013; Trowbridge y Mische, 2016; Hick, 2009; Sherman y Siporin, 2008).

Diversos meta-análisis publicados recientemente sobre la eficacia de las Intervenciones basadas en mindfulness (IBM) aplicadas a profesionales clínicos, sanitarios y estudiantes de trabajo social han demostrado ser eficaces en diferentes aspectos relacionados con la salud mental y la práctica de ayuda (Beer et al., 2020; Trowbridge, y Mische, 2016; Wang, 2018). No obstante, cabe señalar que los estudios centrados en las trabajadoras sociales del ámbito de los servicios sociales son escasos y si consideramos que existen factores únicos que afectan la salud laboral de estas profesionales (Beer et al., 2020) se hace necesario explorar con mayor profundidad los estudios que muestren los efectos de las IBM en las trabajadoras sociales de los servicios sociales.

A partir de lo expuesto, el objetivo principal de este estudio es investigar y sintetizar la evidencia disponible sobre los efectos beneficiosos de las intervenciones basadas en mindfulness y otras prácticas contemplativas aplicadas a trabajadoras sociales, centrándonos en los estudios que han evaluado a profesionales que desarrollan su actividad en el ámbito de los servicios sociales y que también evalúan variables psicosociales positivas previas a la COVID 19.

En la presente revisión se han explorado y revisado publicaciones recientes sobre la aplicación de IBM en el ámbito del trabajo social de los servicios sociales y se ha considerado su calidad metodológica, los programas implementados y las medidas utilizadas para evaluar su efectividad. Asimismo, se han analizado los efectos de las IBM de los estudios seleccionados en diversas variables psicosociales de trabajadoras sociales de servicios sociales y se han comparado sus efectos según: el tipo de diseño o intervención, el grupo de control, la duración de las sesiones o los seguimientos realizados a posteriori. Finalmente, se esbozan las conclusiones, limitaciones y posibles líneas de investigación futura.

MÉTODO

Esta revisión sistemática se llevó a cabo de acuerdo con los elementos de informes preferidos para revisiones sistemáticas y metaanálisis (PRISMA) (Moher et al., 2009).

Estrategia de búsqueda

Se hizo una búsqueda de artículos publicados hasta el 4 de noviembre de 2020, en las bases de datos electrónicas Scopus, Web of Science, Dialnet Plus y Google Academic. Para esta búsqueda se utilizaron las palabras clave: 1. “social-work AND mindfulness”, 2. “social-work AND compassion” y 3. “social-work AND contemplative” (Tabla 1). Además, se revisaron las revisiones sistemáticas anteriores, en busca de artículos que cumplieron los criterios de inclusión (Beer et al., 2020; Trowbridge y Mische, 2016; Wang, 2018; DeMauro et al., 2019).

TABLA 1. Búsqueda bibliográfica y criterios de selección para bases de datos.

Descriptores/Términos	Trabajo Social, mindfulness, compasión, práctica/es contemplativa/es
Período temporal	Hasta 04/11/2020
Idioma	Inglés y Español
Bases de datos	Scopus, Web of Science, Dialnet y Google Academic
Tipos de documentos	Artículos publicados en revistas con factor de impacto

Fuente: Elaboración propia.

Procedimiento y análisis de datos

La búsqueda se realizó hasta el mes de noviembre de 2020 en todas las bases de datos. Tras localizar los artículos en las bases de datos, se eliminaron los duplicados. Se realizó una selección preliminar de títulos y resúmenes con base en los criterios de inclusión y exclusión definidos. Posteriormente, se buscaron y leyeron en su totalidad los documentos restantes y se realizó una revisión de calidad.

El proceso de selección se realizó de forma independiente por dos autores (RRC y MBY), y en caso de duda se resolvió con la implicación del tercer autor (ACM) (Bekhet y Zauszniewski, 2012). Posteriormente, los documentos seleccionados fueron analizados y sintetizados.

Criterios de inclusión y exclusión

Los criterios para la selección de artículos fueron, en primer lugar, la aplicación de programas de mindfulness y/o compasión y/o otras prácticas contemplativas a profesionales del trabajo social del ámbito de servicios sociales (generales y específicos) y la evaluación de sus efectos; y, en segundo lugar, la utilización de diseños experimentales o cuasi-experimentales con o sin grupo control, a causa de la escasa existencia de experimentales.

Se incluyeron estudios en los cuales se aplican intervenciones estandarizadas y ampliamente investigadas; Mindfulness-Based Stress Reduction (MBSR), Mindfulness-Based Cognitive Therapy (MBCT); así como intervenciones no estandarizadas que se articulan en base al aprendizaje y la realización de ejercicios de mindfulness, siendo este el elemento principal de la intervención (todas ellas agrupadas bajo las siglas IBM).

La búsqueda se limitó a artículos científicos publicados en revistas con factor de impacto, exceptuando el estudio de (González-Ayuso, 2016) que ha sido publicado como capítulo de un libro especializado de Trabajo Social y se ha incluido por ser el único estudio aplicado con trabajadoras sociales de servicios sociales en el estado español. No hubo ninguna limitación en la fecha, puesto que las investigaciones en este tema son bastante recientes, en general, son a partir del año 2010, y la mayoría, más concretamente, en los últimos 8 años. Se seleccionaron solo artículos en inglés y español, puesto que la mayoría de las publicaciones sobre esta materia se encuentran en inglés, y el español era el segundo idioma con más publicaciones.

Se excluyeron artículos la muestra de los cuales no fuera exclusivamente de trabajadoras sociales del ámbito de servicios sociales. Además, no se tuvieron en cuenta los estudios correlacionales, metaanálisis y revisiones sistemáticas y estudios teóricos.

Selección de los estudios

Después de la lectura del título y del resumen de los 1186 estudios localizados en las cuatro bases de datos se preseleccionaron 28 estudios, de los cuales se excluyeron 8 para estar duplicados. En consecuencia, 20 estudios fueron preseleccionados. Del listado de referencias de estudios previos se preseleccionaron 7 estudios, de los cuales se eliminaron 3 estudios para estar duplicados. Por lo tanto, se preseleccionaron 4 estudios. Del listado de referencias de las revisiones de la literatura previas publicadas, se preseleccionaron 3 estudios.

En la fase de selección se revisaron los textos completos de los 24 estudios preseleccionados para determinar si cada uno de ellos cumplía los criterios de inclusión o en caso contrario tenían que ser excluidos. De los 24 estudios revisados a texto completo, se excluyeron 17 estudios para incumplir el criterio de inclusión de que la muestra no es exclusivamente de trabajadoras sociales del ámbito de servicios sociales.

En la Figura 1 se muestra el diagrama de flujo del proceso de selección de la muestra de artículos revisados, según la declaración PRISMA (Urrútia y Bonfill, 2010). Finalmente, se incluyeron para la revisión sistemática siete estudios que cumplían los criterios anteriormente especificados, que abordan la eficacia de intervenciones basadas en mindfulness (IBM) en Trabajadoras Sociales del ámbito de los servicios sociales generales y específicos.

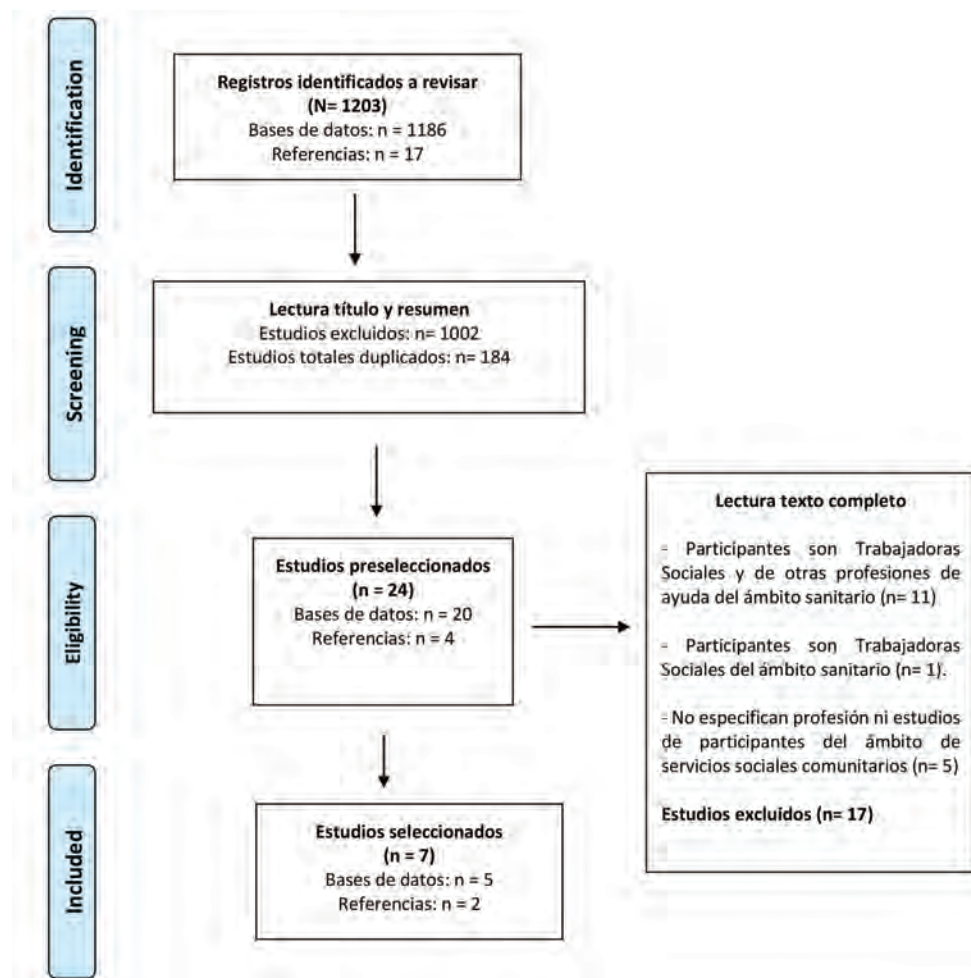
Extracción de datos

Dos investigadores (RRC y MBY) extrajeron de forma independiente los siguientes datos de cada uno de los artículos incluidos: autores, año, diseño, población, muestra, tipo de intervención, resultados medidos, instrumentos utilizados y hallazgos principales. Un investigador ingresó los datos en una tabla. El segundo investigador luego comparó la tabla con sus datos y se verificó la precisión de la información. Si había alguna discrepancia con los datos extraídos, el primer autor volvió al artículo original para aclarar la información correcta y corregir los datos de la tabla en consecuencia.

Análisis de la calidad de los estudios

El riesgo de sesgo se evaluó sistemáticamente mediante una adaptación de la herramienta de Colaboración Cochrane (Higgins & Green, 2011). Calificamos los siguientes aspectos: selección, desempeño, detección, deserción e informes. Dos investigadores (RRC y MBY) realizaron de forma independiente la calificación del riesgo de sesgo. En caso de discrepancias, se involucró a un tercer investigador (ACM) y se analizó el artículo correspondiente para resolver la discrepancia.

Figura 1. Diagrama flujo proceso selección.



RESULTADOS

Características de los estudios

En referencia a las características de los estudios seleccionados el rango de los años de publicación de los estudios analizados comprende desde 2011 a 2020. Seis de los siete artículos se publicaron en varias revistas de habla inglesa. La revista *British Journal of Social Work* ha publicado tres de los artículos y las revistas *Australian Social Work*, *Journal of Social Work* y *Journal of Religion & Spirituality in Social Work: Social Thought* presentan un artículo cada una (véase tabla 2). Así mismo, incluimos un estudio que ha sido publicado en un libro científico de trabajo social en el estado español.

Cuatro de los siete estudios informaron de alguna descripción de la edad de las trabajadoras sociales, la media de la edad fue de 40,6 años. Así mismo, todos los estudios informaron de género. De estos el 83,8% eran mujeres, lo cual refleja una distribución de género bastante desequilibrada. Todos los estudios informaron sobre el ámbito laboral de las trabajadoras sociales y cinco informaron de la situación laboral. En 6 de los 7 estudios la muestra está completamente compuesta por trabajadoras sociales. En un estudio el porcentaje de la muestra que eran trabajadoras sociales es del

82% y el restante 18% estaba compuesto por profesionales del ámbito de la intervención social (McGarrigle y Walsh, 2011). En dos estudios, de los cinco que especifican el ámbito de intervención, las trabajadoras sociales ejercen en el ámbito de la infancia, juventud y familia (McGarrigle y Walsh, 2011; Kinman y Grant, 2017). En dos estudios, el ámbito en el cual ejercen es variado: servicios sociales generales y específicos, intervención familiar, grupal, salud, educación, empresas privadas, etc. (González-Ayuso, 2016; Crowder y Sears, 2017). En un estudio las trabajadoras sociales ejercen en el ámbito de los servicios sociales especializados en la atención a las personas mayores (Pandya, 2021).

Respecto al tamaño de muestra, varió desde 11 a 144 profesionales ($M = 40,71$). Un total de 282 trabajadoras sociales participaron en estos 7 estudios. Del total de participantes, el 80,13% eran trabajadoras sociales de servicios sociales especializados (el 51,06% del ámbito de la atención a personas mayores, el 27,30% del ámbito de la infancia y un 1,77% sin especificar), el 13,12% trabajadoras sociales de servicios sociales del ámbito local, el 8,41% de ámbito no especificado, el 6,02% trabajadoras sociales que realizaban intervención individual, familiar y grupal, el 2,65% del ámbito de la salud, el 1,32 del ámbito de la empresa privada y el 1,11% eran trabajadoras sociales en situación de desocupación. Las Intervenciones Basadas en Mindfulness (IBM) se aplicaron a 167 participantes (58,3%) del total, en diferentes centros de servicios sociales, colegios de trabajo social y centros geriátricos. Las características de la muestra de los estudios revisados se exponen en la Tabla 2.

Diseño de los estudios

Cuatro de los siete estudios realizaron un diseño controlado, de los cuales dos fueron aleatorizados (Pandya, 2020; Crowder y Sears, 2017) y los otros dos no (Gregory, 2015; Kinman y Grant, 2017). Los cuatro estudios restantes utilizaron un diseño cuasiexperimental. Cuatro estudios presentan grupo control y sus características han sido diferentes según el estudio. El tipo de grupo control predominante en los artículos fue participantes en lista de espera, en dos de ellos (Kinman y Grant, 2017; Crowder y Sears, 2017) y uno con grupo de control pasivo (Gregory, 2015). En un estudio se empleó grupo de control activo (Pandya, 2020). A los participantes, en este estudio, se les proporcionó una Instrucción Regular Musical (IMR) que consistía en escuchar música instrumental pregrabada en cada sesión (Tabla 3).

Características de los resultados

Tiempos de evaluación

En los siete estudios, las medidas de evaluación se tomaron en dos tiempos diferentes: pre-intervención y post-intervención. Y en un estudio, además, se tomaron medidas de seguimiento. Estas fueron, según el estudio: a las 13 semanas después de la finalización de la intervención para ambos grupos (intervención y LE) y a las 26 semanas solo para grupo de intervención (Crowder y Sears, 2017).

Escalas

Los siete estudios presentan cierta variabilidad de escalas para evaluar las diferentes medidas. Cuatro estudios utilizan la misma prueba (Professional Quality of Life, proQOL) para medir el “estrés percibido”, satisfacción y fatiga por compasión, autoeficacia emocional y burnout (Pandya, 2020; Crowder y Sears, 2017; Gregory, 2015; Kinman, Grant y Kelly, 2019; Kinman y Grant, 2017).

TABLA 2. Características de la muestra de estudios seleccionados en la revisión bibliográfica.

N.º, Autor y año	Revista	País	Tamaño Grupos	Edad y género	Ámbito TS	Tipo muestra
1. McGarrigle, T., Walsh, C.A. (2011)	British Journal of Social Work.	EEUU	N=12 G1= 12 (No grupo control)	11 F 1 M 91,6% mujeres	Agencia de Servicios Sociales	82% TS 9 TS + 3 (uno era Consejero de Atención Infantil y Juvenil, y dos eran Trabajadores de Apoyo Infantil y Familiar)
2. Gregory, A. (2015)	Journal of Religion & Spirituality in Social Work: Social Thought.	EEUU	N=11 G1= 5 GCP = 6 (Grupo Control Pasivo)	10 F 1 M 91% mujeres	Agencia de Servicios Sociales	100% TS
3. González-Ayuso, M. (2016)	Capítulo libro. en Guinot, C., Ferran, A. (eds.) Trabajo Social: arte para generar vínculos. Ed. Deusto digital. Bilbao. España	España	N=20 G1= 20 (no grupo control) Finalizan= 16	19 F 1 M 95% mujeres 45,79 años de media	Colegio Oficial de Trabajo Social de Burgos (España)	100% TS -Desempleadas: 15,79% -Activo: 84,21% -Salud: 37,5% -SSSS Específicos: 25% -Empresas privadas: 18,75% -Educación, SSSS base, etc.: resto.
4. Kinman, G., Grant, L. and Kelly, S. (2019)	British Journal of Social Work.	Reino Unido	N=26 G1= 26 (no grupo control) No aleatorizado	85% mujeres 43 años de media	TS ámbito local Reino Unido	100% TS - 82% trabaja tiempo completo
5. Crowder, R., Sears, A. (2017)	Australian Social Work.	Canadá	N= 17 G1= 7 GLE= 7 (Grupo Control Pasivo) aleatorizado	78,6% mujeres 46,5 años de media	Colegio Trabajo Social de Alberta (Canadá)	100% TS +90% Trabajo Social individual, grupal, familiar
6. Pandya, S. P. (2020)	Journal of Social Work	India	Aleatorizado N=144 G1= 72 GCA= 72 (grupo control activo: sesiones de música) (terminan intervención en T2 125)	62,5% mujeres	Trabajadores Sociales Geriátricos en ciudades del Sur de Asia (Mumbai, New Delhi, Kathmandu, Colombo)	100% TS del ámbito atención a personas mayores (servicios sociales especializados)
7. Kinman, G., Grant, L. (2017)	British Journal of Social Work	Reino Unido	N=55 G1= 25 GLE= 35	G1= 77% mujeres, edad media: 35 años 83,5 GLE= 90% mujeres, edad media: 33 años	de cinco autoridades locales de Inglaterra (mezcla de Consejos Unitarios, Mancomunidades y Municipios del Centro de la Ciudad).	100% Trabajadores Sociales de servicios de infancia, recién graduados.

TABLA 3. Características de los estudios seleccionados en la revisión bibliográfica.

Autor/a	Tipo estudio	Objetivo(s)	Intervención	Medidas
I. McGarrigle, T., Walsh, C.A. (2011)	Método mixto	<ul style="list-style-type: none"> - Evaluar cómo un modelo de sesión grupal de meditación de 8 semanas basado en prácticas contemplativas tales como, actividades basadas en la atención plena, podría influir o ayudar a los trabajadores sociales a mantener el bienestar. - Presentar un modelo destinado a aumentar la conciencia y el enfrentamiento entre practicantes - Revisar la literatura sobre el uso de prácticas contemplativas para los servicios humanos y los profesionales del trabajo social 	G1: CARE (+ meditación, mindfulness y yoga) + autoreflexión 8 sesiones 1/ semana (120 min.)	Triangulación metodológica Tiempos: T1, T2 (2 meses) Medidas: PSS MAAS FOCUS GROUP ESCRITURA DIARIOS Cuantitativas: Cuestionarios Pre y Post: - Perceived Stress Scale (PSS) - Mindfulness Attention and Awareness Scale (MAAS) Cualitativas: Análisis: Grounded Theory. - escritura libre autoreflexiva durante intervención. - Focus group de 2h, postintervención.
2. Gregory, A. (2015)	Cuasi experimental, no controlado, no aleatorizado (Cuanti + Cual)	1. Examinar efectividad de un programa de yoga y mindfulness para disminuir la fatiga y el agotamiento por compasión y para aumentar la satisfacción con la compasión en los trabajadores sociales actualmente empleados. 2. Evaluar la percepción de los trabajadores sociales sobre su relación profesional con sus clientes.	Muestro conveniencia G1: Yoga + Mindfulness + reflexión grupal + actividades para practicar en casa G2: GC LE 3 sesiones 1/ semana (60 min.)	Tiempos: T1, T2 Medidas: - ProQOL (versión 5) - Cuestionario de 4 preguntas abiertas (Grounded Theory)
3. González-Ayuso, M. (2016)	No explícita	Mostrar efectos de un taller de mindfulness, para 20 trabajadores sociales, con el fin de aportar una mayor conciencia sobre las fuentes de estrés laboral, + fomentar la adquisición de técnicas orientadas a su manejo y al bienestar.	G1: Mindfulness (no específica si es MBCR u otra) + ejercicios diarios en casa 12 sesiones 1/ semana (90 min.) + 1 Jornada práctica intensiva (600 min.)	Tiempos: T1, T2 Medidas: - MBI-GS - KIMS

TABLA 3. CONTINUACIÓN

Autor/a	Tipo estudio	Objetivo(s)	Intervención	Medidas
4. Kinman, G., Grant, L. and Kelly, S. (2019)	Estudio de método mixto.	Evaluar los efectos de un programa de capacitación de atención plena de ocho semanas sobre resultados previamente vinculados con la resiliencia emocional y en bienestar en los trabajadores sociales.	G1: adaptación de MBSR y MBCT del estrés y el aprendizaje + libro con lecturas semanales y orientación y CD + opcional descargas de las prácticas de Mindfulness. 8 sesiones	Tiempos: T1 (2 semanas antes intervención), T2 (8 semanas después) 4,5 meses Medidas: - ESE. Emotional self-efficacy by Choi et al. (2013) - RE. Reflective ability by Aukes et al. (2007) - PF. Psychological flexibility by Bond et al. (2011). - SC. Self-compassion by Raes et al. (2011) - Profesional Quality of Life Scale (Stamm, 2010). Versión 2 Compassion fatigue and satisfaction. - Perceived Stress Scale (Cohen et al., 1983). - Entrevistas
5. Crowder, R., Sears, A. (2017)	Estudio exploratorio, controlado, no aleatorizado, de métodos mixtos	investigar las diferencias en los niveles de resiliencia G1: MBSR y el desgaste de los trabajadores sociales después de una intervención MBSR, en comparación con un grupo de lista de espera.	G2: LE (lista espera) con un 8 sesiones 1/semana (150 min.) + 1 Jornada práctica intensiva (600 min.) + práctica en casa	Tiempos: T1 (antes intervención) T2 (post 1 semana) T3 (post 13 semanas) Medidas: - PSS (Escala de estrés percibido) - SCS (Escala de autocompasión) - EQ (Cuestionario de Experiencias) - MBI (Maslach Burnout Inventory) - (ProQOL) Calidad de vida profesional - Entrevista breve semiestructurada (pre y post)
6. Pandya, S. P. (2020)	Estudio experimental, con grupo control activo y aleatorizado	investigar el impacto de un programa de meditación en línea para trabajadores sociales geriátricos en ciudades del sur de Asia para mitigar el estrés, mejorar la calidad de vida profesional y desarrollar competencias laborales.	G1: práctica de Meditación on-line (formato sincrónico) G2A: escuchar música on-line + autopráctica (Formato asincrónico) 90 sesiones 7/Semana 20 min.	Tiempos: T1, T2 (3 meses) Medidas: - PSS (Perceived Stress Scale) - ProQOL (versión 5) - Geriatric Social Work Competency Scale II with Lifelong Leadership Skills (GSWCS-II-LLS)
7. Kinman, G., Grant, L. (2017)	Medidas repetidas; Grupo control de lista de espera	Evaluar una intervención multimodal basada en mindfulness para promover la resiliencia emocional tres días.	G1: Sesiones individuales de mindfulness durante tres días.	Tiempos: T1 (2 semanas antes de inicio entrenamiento) T2 (8 semanas después de la última sesión) Medidas: - Assessing emotional self-efficacy - PSS, - ProQOL, - GRAS (Groningen Reflective Ability Scale) - SCS

Técnicas cualitativas

Cuatro de los siete estudios también aplican varias técnicas cualitativas para la recogida de datos: *focus group*, registros diarios, escritura libre autoreflexiva, entrevistas, cuestionario de cuatro preguntas abiertas y entrevista breve semiestructurada (McGarrigle y Walsh, 2011; Gregory, 2015; Kinman, Grant y Kelly, 2019; Crowder y Sears, 2017). El tipo de técnica utilizada en cada estudio es variable. Dos estudios utilizan la *grounded theory* para el análisis de los datos recogidos (McGarrigle y Walsh, 2011; Gregory, 2015).

Variables analizadas

Las variables más analizadas en la totalidad de los estudios han sido: la fatiga por compasión, la satisfacción por compasión, el estrés percibido y la autocompasión. A continuación, se detallan sus escalas.

La fatiga y satisfacción por compasión se ha evaluado en cinco de los 7 artículos con la misma escala en varias versiones (ProQOL, Professional Quality of Life Scale, Stamm, 2009, 2010). El estrés percibido se ha evaluado en cuatro de los siete artículos con la misma escala: SPS (Perceived Stress Scale; Cohen, Kamarck y Mermelstein, 1983 y su adaptación de 10 ítems; Cohen y Williamson, 1988).

La autocompasión se evaluó en tres de los siete artículos con dos escalas diferentes: SCS (Self compasión Scale; Raes et al., 2011 y Neff, K., 2003).

Hay que decir que la atención y conciencia plena, la fatiga y satisfacción por compasión, burnout, autoeficacia emocional, estrés traumático secundario y la capacidad reflexiva, aunque se evaluaron en menor número de artículos, en dos cada una, se utilizaron las mismas escalas excepto la atención y conciencia plena que se midió con dos escalas diferentes (cuestionario integrado del Inventario de Habilidades de Mindfulness de Kentucky, KIMS, de Baer, Smith y Allen, 2004; Escala de Atención y Conciencia de la Atención Llena, MAAS, de Brown y Ryan, 2003). Así mismo, las siguientes variables se han evaluado cada una, en uno de los siete estudios: flexibilidad psicológica, competencias de trabajo social geriátrico, descentramiento y angustia psicológica.

Todas las variables analizadas fueron autorreportadas por las trabajadoras sociales y todos los estudios, por lo tanto, incluyeron un único informante.

Efectos de la intervención

La descripción de los efectos se ha organizado en tres áreas temáticas, según el tipo de variable medida: (a) emocionales, entre ellas estrés, angustia psicológica, autoeficacia emocional y fatiga y satisfacción por compasión; (b) psicosociales, como el burnout, atención y conciencia plena, autocompasión y competencias de trabajo social geriátrico; (c) cognitivas, entre ellas capacidad reflexiva, flexibilidad psicológica y descentramiento.

Efectos en variables psicosociales

Los dos estudios que evaluaron el burnout encontraron cambios. El estudio casi experimental muestra una reducción considerable de indicadores de burnout de las trabajadoras sociales participantes en el grupo de intervención (González-Ayuso, 2016). En el estudio experimental, las participantes en el grupo de intervención experimentaron menor riesgo de desarrollar agotamiento que el grupo de control en lista de espera (Crowder y Sears, 2017).

En cuanto a la autocompasión, dos de los estudios que la evaluaron, mostraron un aumento significativo en el grupo experimental en relación al grupo control (Crowder y Sears, 2017; Kinman y Grant, 2017). En el único estudio de los tres que no tenía grupo de control, no se observaron cambios significativos en los niveles de autocompasión después de la finalización del programa (Kinman, Grant y Kelly, 2019). Además, el estudio que realizó seguimiento mostró mejoras significativas que se mantuvieron a las 13 y 26 semanas después de la intervención (Crowder y Sears, 2017).

En relación a la medida de atención y consciencia plena, los dos estudios cuasiexperimentales que midieron esta variable, y que carecían de grupo de control, encontraron aumentos significativos en el grupo de intervención (McGarrigle y Walsh, 2011; González-Ayuso, 2016). Este último, mostró aumentos destacados en dos de las cuatro habilidades de mindfulness analizadas: observación y no juicio.

Respecto a la competencia en trabajo social geriátrico, el estudio que evalúa esta variable muestra niveles más altos de competencias laborales en las trabajadoras sociales que participaron en la intervención en comparación con los que participaron en el grupo de control activo (Pandya, 2020).

Efectos en variables emocionales

En cuatro de los 5 estudios que evaluaron la fatiga por compasión concluyeron que las IBM disminuían sus niveles en las trabajadoras sociales participantes en el grupo de intervención. En tres de ellos se reducían respecto al grupo de control, dos en lista de espera (Gregory, 2015; Crowder y Sears, 2017) y un activo (Pandya, 2020), y en un estudio se reducía respecto a la evaluación inicial de esta variable en el grupo experimental (Kinman, Grant y Kelly, 2019). Solo en un estudio de los cinco (Kinman y Grant, 2017) se informó de la falta de evidencia de la reducción de los niveles de esta variable en comparación con grupo de control en lista de espera, aunque las trabajadoras sociales participantes ya mostraron, antes de la intervención, niveles reducidos.

En relación a la satisfacción por compasión, tres de los cinco estudios que midieron esta variable, encontraron que se producía un aumento significativo en el grupo experimental respecto al grupo de control. En dos de estos estudios el grupo de control era en lista de espera (Crowder y Sears, 2017; Kinman y Grant, 2017) y en un activo (Pandya, 2020). El estudio cuasiexperimental (Kinman, Grant y Kelly, 2019) mostró que aumenta los niveles de esta variable después de la intervención y otro estudio encontró que la IBM detiene la reducción de la satisfacción compasión (Gregory, 2015).

En dos de los cuatro estudios que evaluaban el estrés percibido, se concluyó una reducción significativa de sus síntomas en las trabajadoras sociales del grupo de intervención en mindfulness, respecto al grupo de control (Crowder y Sears, 2017; Pandya, 2020). Los dos estudios cuasiexperimentales informan también de una reducción de la incidencia de esta variable en las participantes del grupo de intervención (McGarrigle y Walsh, 2011; Kinman, Grant y Kelly, 2019).

Respecto a la autoeficacia emocional, en los dos estudios que la evaluaron se produjeron aumentos importantes en el grupo experimental (Kinman, Grant y Kelly, 2019; Kinman y Grant, 2017), además, en este último en comparación con el grupo de control.

En relación a la angustia psicológica, el estudio que evaluó esta variable, muestra una reducción significativa de los niveles de angustia psicológica de las trabajadoras sociales después de la intervención en comparación con el grupo de control en lista de espera (Kinman y Grant, 2017).

Efectos en variables cognitivas

Uno de los dos estudios que evaluaron la capacidad reflexiva, encontró diferencias significativas en el grupo experimental en comparación con el grupo de control en lista de espera (Kinman y Grant, 2017). En el estudio cuasiexperimental (Kinman, Grant y Kelly, 2019) no se encontraron mejoras significativas en esta variable. Sin embargo, la puntuación media de esta variable en el inicio del estudio fue alto, lo cual sugiere que la capacidad de reflexión de los participantes ya estaba muy desarrollada.

El estudio experimental (Crowder y Sears, 2017) que evaluó el descentramiento, encontró que el grupo de intervención aumentó de manera significativa los niveles de esta variable en comparación con el grupo de control en lista de espera.

Respecto a la flexibilidad psicológica, en el estudio cuasiexperimental que midió esta variable (Kinman, Grant y Kelly, 2019) se produjeron cambios significativos en el grupo de trabajadoras sociales al finalizar la intervención en comparación con los niveles identificados en el inicio.

Otros hallazgos significativos

En cuatro de los siete estudios se obtienen resultados cualitativos (McGarrigle y Walsh, 2011; Gregory, 2015; Kinman, Grant y Kelly, 2019; Crowder y Sears, 2017).

En el estudio de McGarrigle y Walsh (2011) se concluye que la IBM ha reducido el estrés, ha reforzado la capacidad de autocuidado y ha mejorado el bienestar y las habilidades básicas de relación (atención, regulación, sintonía y empatía) de las trabajadoras sociales con las personas atendidas lo cual ha hecho aumentar la calidad del servicio prestado. Además, las trabajadoras sociales señalan que es necesario el tiempo, el permiso y el lugar para aprendizaje y la práctica de actividades basadas en mindfulness. Por último, las autoras, a través del análisis temático de los datos cualitativos crean un modelo meditativo que representa la relación entre conciencia, autocuidado y bienestar para el trabajo social.

Por su parte, Gregory (2015) muestra un aumento sustancial de la percepción positiva de las trabajadoras sociales en su relación profesional con la persona cliente/usuario que habían definido previamente como “difíciles de trabajar”. Así mismo, en esta línea, en el estudio de Crowder y Sears (2017) las trabajadoras sociales informaron de cambios positivos en actitudes, perspectivas, comportamientos y energía en relación con sus relaciones laborales, se sienten más esperanzadas y están más presentes con las personas que atienden sin verse tan afectadas por su sufrimiento.

Por último, Kinman, Grant y Kelly (2019) de los datos cualitativos obtenidos infieren que la IBM ayudó a las trabajadoras sociales a manejar mejor el estrés del trabajo, aumentar su resiliencia y mejorar su desempeño laboral.

DISCUSIÓN

En esta revisión sistemática analizamos los efectos de las IBM sobre trabajadoras sociales atendiendo especialmente a sus efectos en el bienestar y la ética profesional con el objetivo de sintetizar la evidencia disponible al respecto. Dos estudios incluyeron medidas de mindfulness para verificar la efectividad de las intervenciones por lo que se limita la verificación de causalidad entre la práctica de mindfulness y los posteriores cambios relacionados en variables relacionadas en aspectos psicosociales (Gardland, 2013). Sin embargo, las IBM utilizadas en estos dos estudios que incluyen

medidas de mindfulness han demostrado ser efectivos para incrementar las variables de mindfulness, independientemente del número de sesiones y la frecuencia (McGarrigle y Walsh, 2011; González-Ayuso, 2016). La capacidad de Mindfulness puede aumentar la conciencia de las primeras señales de advertencia del estrés antes de que se vuelva nocivo y proporcionar herramientas para compensar el susyos efectos negativos en el bienestar y el desempeño laboral (Beer et al., 2020).

En cuanto a los aspectos emocionales del malestar psicológico, se observa que el estrés se ha evaluado en más de la mitad de los estudios incluidos y todos han encontrado mejoras de esta variable en trabajadoras sociales, incluso a los tres y seis meses después de la intervención (Crowder y Sears, 2017), por lo cual ratifican lo encontrado en la revisión sistemática de Beer et al. (2020) donde se destaca la potencial eficacia y viabilidad de los IBM para reducir el estrés en trabajadoras sociales del ámbito no sanitario ya que el mindfulness puede aumentar la conciencia de las primeras señales de advertencia del estrés antes de que se vuelva inmanejable, así como proporcionar herramientas para compensar sus efectos negativos sobre el bienestar y desempeño laboral en las trabajadoras sociales de servicios sociales.

Así mismo, los resultados obtenidos a la revisión sistemática sugieren efectos de las IBM en otras variables relacionadas con el bienestar psicológico, como son la mejora del procesamiento cognitivo y ejecutivo de las trabajadoras sociales mediante el refuerzo de la: capacidad reflexiva (Kinman, Grant y Kelly, 2019; Kinman y Grant, 2017), flexibilidad psicológica (Kinman, Grant y Kelly, 2019) y descentramiento (Crowder y Sears, 2017). Estos hallazgos van en la línea de la evidencia preliminar sobre los efectos positivos de las IBM (Davidson y Schuyler, 2015; Holzel et al., 2011; Cebolla et al., 2018).

En cuanto a aspectos psicosociales relacionados con el bienestar laboral dos estudios encontraron que las IBM son efectivas para reducir los niveles burnout y el riesgo de experimentarlo por parte de las trabajadoras sociales (González-Ayuso, 2016; Crowder y Sears, 2017). Estos resultados se entienden como provisionales puesto que no se han encontrado estudios de metaanálisis y revisiones sistemáticas que los confirmen. No obstante, dado que el burnout se caracteriza por el agotamiento emocional, la regulación de las emociones es una habilidad importante para reducirlo y en esta línea se encontró recientemente que un entrenamiento basado en mindfulness y otras prácticas contemplativas (EBC) es efectivo para disminuir de forma significativa la frecuencia de emociones negativas en personal sanitario de la Unidad de Cuidados Intensivos de un hospital (Cebolla et al., 2022).

Asimismo, hay que destacar que en la revisión sistemática no se encontraron estudios que evaluaron efectos de las IBM en variables psicosociales relevantes como el engagement y/o el rendimiento laboral. Este hallazgo va en la línea del mencionado en otros estudios y subraya la necesidad de realizar más estudios al respecto (Coo y Salanova, 2018; Coo, 2020).

En relación a las variables de satisfacción por compasión y fatiga empática, aspectos relacionados con la ética profesional en el trabajo social, la mayoría de los estudios analizados en la revisión sistemática encontraron que las IBM son efectivas para mejorar los niveles de satisfacción por compasión y reducir los niveles de fatiga por compasión independientemente del número de sesiones y la frecuencia (Gregory, 2015; Kinman y Grant, 2017). Entre estos estudios solos uno fue ECA (Estudio Controlado Aleatorizado), por el que se deben de tomar estos resultados con cautela. La que obtuvo mejor resultados fue la escala de Satisfacción por Compasión que se refiere a sentimiento de logro derivado de los esfuerzos realizados para ayudar a otra persona. Estos resultados están en concordancia con el que se señala en un estudio de revisión sistemática reciente donde se concluye

que las IBM reducen la fatiga por compasión y aumentan la calidad de vida y el bienestar emocional del personal sanitario, en el cual se incluyen a trabajadoras sociales (Pintado, 2018). Así mismo, es importante considerar que, en estudios realizados a trabajadoras sociales del ámbito sanitario, una menor fatiga por compasión y agotamiento y mayor satisfacción de compasión se asocia significativamente con mindfulness (Conversano et al., 2020; Brown, Ong y Mathers, 2017).

Aun así, en otras revisiones sistemáticas sobre efectos de IBM en profesionales del trabajo social, se observa que no se informa sobre los efectos de estas en variables relacionadas con la ética profesional de las trabajadoras sociales del ámbito no clínico (Beer et al., 2020; Trowbridge, K. y Mische L., 2016; Wang, 2018 y DeMauro et al., 2019). Esto evidencia una carencia de estudios experimentales que evalúen estos aspectos en trabajadoras sociales de Servicios Sociales.

La autocompasión es otra variable significativa relacionada con la ética profesional y que, en la revisión sistemática sobre los efectos de las IBM en trabajadoras sociales, se ha evaluado en menos de la mitad de los estudios y, excepto uno (Kinman, Grant y Kelly, 2019), el cual no tenía grupo de control, el resto han encontrado mejoras significativas en los resultados. Hay que señalar que ninguno de los estudios que ha evaluado la autocompasión ha evaluado, al mismo tiempo, la capacidad de mindfulness. No obstante, existen evidencias de que el aumento de los niveles de autocompasión está relacionado con el aumento de mindfulness y las habilidades mindfulness en profesionales de ayuda que han recibido una IBM (Campos-Bacas, Cebolla y Rasal, 2015; Pidgeon, Ford y Klaassen, 2014). A partir de esta idea, existe evidencia empírica que sustenta la relación entre facetas del mindfulness y la autocompasión como elementos relevantes para explicar el bienestar (Baer, Lykins y Peters, 2012). Se ha descubierto que mayores niveles de compasión y autocompasión conducen a mejoras en los niveles de tolerancia, cooperación y habilidades interpersonales en general (Shonin et al., 2014) y mayor uso de estrategias de autocuidado (Jay Miller et al., 2019). Por todo el mencionado anteriormente, varios autores consideran la necesidad de enfatizar la importancia de la autocompasión para promover el autocuidado efectivo desde las primeras etapas de la formación en trabajo social por lo que validar estrategias que la fomenten resulta primordial (Grant y Kinman, 2014; Kinman y Grant, 2017).

Además, se han identificado estudios a la revisión sistemática que evalúan cualitativamente el impacto positivo de las IBM en variables como el autocuidado y cuidado y relación de los demás (McGarrigle y Walsh, 2011; Gregory, 2015; Crowder y Sears, 2017). No obstante, estos resultados se deben de interpretar con cautela puesto que esto podría indicar que el aumento se produce en la confianza o conciencia de las trabajadoras sociales en el desarrollo de estas habilidades, más que en una mejora efectiva en la relación de ayuda percibida por las personas usuarias. No se han identificado estudios similares con los que comparar estos resultados.

Por último, en relación a los posibles efectos de las IBM en los aspectos éticos, hay que destacar que no se observaron estudios que evalúen los efectos de las IBM sobre la posible reducción de la violencia al usuario, a pesar de ser una variable relevante para medir la calidad ética de la intervención social de las profesionales del trabajo social (Idareta-Goldaracena, 2017 y 2018).

En cuanto a los efectos de las IBM en el refuerzo de competencias en la práctica del trabajo social, se encuentra tan solo un estudio que lo evalúa de forma cuantitativa en esta revisión bibliográfica, concretamente con el cuestionario Geriatric Social Work Competency Scale II with Lifelong Leadership Skills y muestra un aumento de competencias en la percepción de trabajadoras sociales

del ámbito geriátrico (Pandya, 2020) aunque no realiza un análisis cualitativo para entender los cambios en la práctica.

No obstante, cuatro estudios sí que muestran resultados cualitativos que evidencian efectos preliminares en el refuerzo de competencias de la práctica del trabajo social vinculadas sobre todo con la relación con uno/a mismo/a y con las demás personas: mejora la relación de ayuda con personas usuarias (McGarrigle y Walsh, 2011), percepción más positiva de la relación profesional con clientes definidos previamente como “difíciles” de trabajar (Gregory, 2015), refuerzo de actitudes, perspectivas, comportamientos y energía en la relación con compañeros/se, supervisores/se y personas usuarias (Crowder y Sears, 2017), mejor gestión del estrés del trabajo, aumento de su resiliencia y mejora su desempeño laboral (Kinman, Grant y Kelly, 2019). Destacar en el estudio de McGarrigle y Walsh (2011) que, a través del análisis temático de los datos cualitativos, crean un modelo meditativo que representa la relación entre conciencia, autocuidado y bienestar para el trabajo social.

Estos resultados se suman a la creciente evidencia de que la práctica de mindfulness y otras prácticas contemplativas fomenta un estilo de comunicación más abierto, cálido y consciente, lo cual conduce a una escucha más centrada como una mayor flexibilidad y un mejor reconocimiento de las emociones propias y de los otros (Beckam et al., 2012). Por lo tanto, los hallazgos obtenidos en este estudio apoyan la hipótesis del potencial de mindfulness y otras prácticas contemplativas para reforzar habilidades y competencias clave de los/las profesionales de ayuda en su relación con persona cliente/usuario (Conejos, 2022; Demarzo y Cardoso, 2021; Garrote-Caparrós, 2022; Brito-Pons, Campos y Cebolla, 2018). No obstante, los estudios analizados no ofrecen respuestas sobre si las personas usuarias perciben cambios en la relación de ayuda después de una IBM. Esto podría indicar que el aumento se produce en la confianza o conciencia del/la profesional del trabajo social en el desarrollo de estas habilidades, más que en una mejora efectiva en la relación de ayuda percibida por las personas usuarias.

En suma, parece que los hallazgos obtenidos en el presente estudio apuntalan la hipótesis de que mindfulness y las prácticas contemplativas son una potencial herramienta para el refuerzo de aspectos psicosociales asociados al bienestar y la ética profesional de profesionales del trabajo social. Sin embargo, dado que no tenemos evidencia sobre el efecto que la duración y el diseño de las IBM puede tener sobre los resultados, este factor debería ser estudiado más ampliamente en el futuro.

Implicaciones prácticas en la formación y práctica del Trabajo Social

Estos resultados tienen algunas implicaciones para la formación y la práctica del Trabajo Social. Primero, las IBM pueden ser una estrategia eficaz para promover la salud mental y el bienestar psicológico que va más allá de la simple perspectiva de disminuir los aspectos negativos de la experiencia. En el desafío de empoderar y hacer crecer a los profesionales del Trabajo Social, estas prácticas pueden ser adecuadas desde una perspectiva integradora que incluye el bienestar psicológico y la promoción de la salud pudiendo ser implementadas como estrategias de intervención para abordar la salud mental y el bienestar en el trabajo y en la formación en el ámbito universitario.

A causa de las habilidades psicosociales que cultivan, como la introspección, la conciencia, la aceptación, la regulación de las emociones, la compasión y el procesamiento de la información, las prácticas contemplativas son transformadoras tanto para la práctica como profesional del trabajo social como para el estudiantado. Para que las profesionales puedan llevar a cabo una práctica ética del

trabajo social tienen que saber hacerlo (conocimientos), poder hacerlo (estructuras) y querer hacerlo (virtudes) y las IBM tienen el potencial de reforzar estas tres dimensiones. En este sentido, como indican algunos de los resultados obtenidos pueden ser de ayuda para potenciar el autocuidado y el cuidado de los demás a través de la relación de ayuda, convirtiéndose así en una estrategia complementaria para mejorar el desempeño profesional mediante una práctica más ética. Así mismo, las IBM en el aula de Trabajo Social pueden facilitar el autocuidado durante y después del proceso intenso de educación formal y preparar mejor al estudiantado para cultivar su bienestar en entornos profesionales después de graduarse dotándolo de nuevas herramientas y habilidades.

Las IBM no tienen por qué ser costosas en recursos y tiempos. Todo el contrario, se muestran prometedoras como estrategias de intervención rentables para promover la salud mental y el bienestar. La variabilidad de diseños y duración de las IBM de los estudios analizados son una muestra de ello. Y probablemente se puede decir el mismo en el futuro respecto a las IBM específicamente en el ámbito de la intervención social. Se puede aplicar un breve programa de formación inicial seguido fácilmente de actividades complementarias y otras oportunidades de capacitación que incluyen ejercicios dirigidos utilizando diferentes tipos de plataformas tecnológicas, es decir, como aplicaciones para teléfonos móviles, webinars, prácticas de audio guiadas, grupos de práctica contemplativa e iniciativas corporativas que requieren costes relativamente marginales, como proporcionar un espacio y práctica abierta o incorporar prácticas contemplativas breves a actividades protocolarias como reuniones o intervenciones sociales a diferentes niveles.

LIMITACIONES DEL ESTUDIO

En primer lugar, un gran número de estudios incluidos en esta revisión sistemática no tenían un grupo de control (Mc Garrigle y Walsh, 2011; González-Ayuso, M., 2016; Kinman, Grant and Kelly, 2019), y un estudio controló la actividad realizada (actividad de control o MBI) (Pandya, 2020) y no a los participantes. Asimismo, a pesar de incluirse solo estudios realizados exclusivamente con trabajadoras sociales de servicios sociales, los contextos institucionales y políticas sociales son muy diversas y complejas por el que los estresores ambientales no se controlan en la posible influencia durante la aplicación de la IBM. Todo esto significa que los resultados obtenidos en este estudio no pueden atribuirse directamente a las IBM.

Además, solo disponemos de un estudio que ha realizado seguimientos sobre los efectos de las IBM en trabajadoras sociales a largo plazo (Crowder y Sears, 2017), lo que puede afectar los resultados en este sentido dado que se ha demostrado que estas intervenciones producen un mayor efecto sobre la conducta y la adquisición de las actitudes de atención plena de los meditadores después de unos meses de práctica (Grossman 2010; Kabat-Zinn 2003). También señalar que se observaron algunos problemas de calidad en los estudios examinados después de evaluar el riesgo de sesgo. Muchos de los estudios 4/7 (58,2%) tenían tamaños de muestra limitados, lo que dificulta identificar pequeños cambios y generalizar los resultados.

Cabe señalar que el 51% del total de participantes, pertenecientes al mismo estudio, realizan la práctica meditativa en formato on-line (Pandya, 2020), es decir, de forma no presencial y sincrónica, lo que evidencia diferencias importantes en el diseño y aplicación de las intervenciones del resto de los estudios seleccionados. Algunas investigaciones encuentran que las IBM en formato online producen mejoras en la reducción del estrés y el aumento de la atención plena, la empatía, la resiliencia y confianza para brindar una atención tranquila y compasiva en profesionales y estudiantes

de profesiones de ayuda del ámbito clínico, entre los que se encuentran trabajadoras sociales (Kemper y Khirallah, 2015; Kemper, Lynn y Mahan, 2015). Asimismo, existe evidencia de que las IBM on-line son convenientes y rentables y pueden mejorar el bienestar en entornos organizacionales (Spijkerman y col., 2016).

También es importante señalar que ninguno de los estudios abordó la formación de instructores, lo que puede afectar directamente los resultados, teniendo en cuenta que las habilidades del instructor son fundamentales para asegurar un cierto nivel de estandarización entre estudios (Miller & Rollnick, 2014). Además, existe una importante variabilidad en el diseño y duración de las IBM aplicadas en los estudios seleccionados por lo que no tenemos evidencia sobre el efecto que la duración y el diseño de las IBM puede tener sobre los resultados.

Finalmente, en la muestra de los estudios incluidos en esta revisión no se tuvieron en cuenta los modelos de intervención de las y los profesionales del trabajo social, sus niveles de formación y práctica personal previa, lo cual sin duda limita la comprensión sobre la forma en que las IBM pueden influir en aspectos psicosociales asociados a su bienestar y ética profesional.

Finalmente, sólo uno de los estudios ha incluido la evaluación de una variable psicosocial positiva como las competencias de trabajo social geriátrico (Pandya, 2020). Esto significa que no se han analizado otras variables psicosociales relevantes como el engagement, el compromiso ético, la pasión por el trabajo, el bienestar laboral, etc., por lo que no tenemos acceso a una comprensión cabal acerca de los efectos de las IBM en los aspectos que inciden en la calidad de vida laboral de estas trabajadoras sociales.

CONCLUSIONES

A pesar de que las IBM parecen prometedoras, es necesario continuar investigando para superar algunas de las limitaciones anteriores. A continuación, se exponen una serie de recomendaciones que pueden ayudar a mejorar la investigación.

En cuanto al diseño de los estudios, se recomienda realizar estudios impulsados por la perspectiva metodológica propia del trabajo social y estudios de mayor rigor y calidad (Trowbridge y Mische, 2016; Gardland, 2013). Así mismo, la evidencia sugiere la necesidad de futuros estudios con una muestra más grande (Wang, 2018) y homogénea, es decir, que aborden la efectividad de IBM específicamente con profesionales del trabajo social de mismo ámbito (servicios sociales, sanitario, educación, etc.), a causa de su posición única y estresores distintivos (Gardland, 2013; Beer et al., 2020; DeMauro, te. al., 2019). En este sentido, también se recomienda valorar la influencia de contexto organizacional en los posibles efectos de las MBI de (Beer et al., 2020). También nos parece necesario investigar de forma controlada el nivel de práctica previa en mindfulness de las trabajadoras sociales para ver si esto puede influir en los resultados. Solo un estudio de esta revisión sistemática informa de que los participantes no tenían experiencia previa en mindfulness (Crowder y Sears, 2017) y el resto de estudios no informan sobre esto, lo que supone una clara limitación al comparar los datos entre las trabajadoras sociales participantes. Finalmente, se requiere un planteamiento de estudios longitudinales con seguimientos a largo plazo, que permitan establecer conclusiones más firmes sobre la eficacia de estas intervenciones (DeMauro et al., 2019).

En relación a la evaluación de los resultados, se sugiere ampliar el rango de medidas, utilizando evaluaciones más allá de los cuestionarios de autoinforme utilizados habitualmente y se propone in-

corporar, por ejemplo, la medida de observación en tercera persona de la calidad de las interacciones maestro-alumno, que se usa con frecuencia en las evaluaciones de desempeño de los maestros, se podrían adaptar y usar para investigar como mindfulness se relaciona con la calidad de las interacciones trabajadora social-cliente/usuario (DeMauro, te. al.,2019). También es de gran importancia utilizar métodos mixtos, es decir, un enfoque cuantitativo y cualitativo, para percibir los matices de las experiencias individuales y los procesos internos de las trabajadoras sociales y comprender mejor los efectos y los mecanismos de las IBM en los diferentes aspectos vitales y laborales desde su perspectiva (Gardland, 2013; Wang, 2018).

Por otro lado, se propone ampliar el foco de la investigación para conocer si la práctica mindfulness mejora áreas como la satisfacción usuaria, comunicación o adherencia al trabajo (Trowbridge y Mische, 2016). Por último, se sugiere examinar de forma más detallada qué tipos de práctica de mindfulness son eficaces para qué condiciones específicas y perfeccionar mejor tanto las definiciones como los usos en la práctica, diferenciando los diferentes tipos de técnicas y, si procede, recurrir a otros campos que poseen una alta validación de las diferentes prácticas de meditación para incorporarlas de acuerdo con la misión, valores y ética de nuestra profesión del trabajo social (Wang, 2018). En esta línea, sería interesante ver el papel que juegan las Intervenciones Basadas en la Compasión (CBI), dado que se ha demostrado que son más efectivas que las IBM para aumentar la empatía en profesionales de ayuda (Brito et al., 2018).

En síntesis, a pesar de que las IBM dirigidas a profesionales del trabajo social parecen contribuir a mejorar la salud mental y el bienestar de estos, los resultados de los estudios se tienen que tomar con cautela. La expansión creciente de este tipo de intervenciones en el trabajo social tiene que ir acompañada de un mayor número y calidad de las investigaciones; igualmente, los efectos de las anteriores variables tienen que considerarse y cuantificarse, con el fin de optimizar la eficacia de las intervenciones y programas basados en mindfulness y otras prácticas contemplativas (Gardland, 2013).

Esta revisión sistemática ha analizado los estudios disponibles sobre los efectos de las IBM en trabajadoras sociales de Servicios Sociales. Los resultados obtenidos en este estudio demuestran que las IBM albergan cierto potencial para la reducción de la sintomatología clínica en trabajadoras sociales (estrés, ansiedad). No obstante, los resultados son limitados en términos de aumento del bienestar ya que no tenemos suficiente evidencia que muestre una influencia beneficiosa de las IBM en aspectos psicosociales relacionados con el bienestar laboral (burnout, engagement, rendimiento, etc.), así como en la ética profesional (aumento compromiso ético, autocuidado, etc.). Esto apunta a la necesidad de realizar más estudios que permitan explorar si las IBM pueden contribuir a reforzar aspectos relacionados con el bienestar laboral y la ética en la práctica del trabajo social.

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Mecanismos de apoyo para trabajadores de servicios sociales: caminos hacia un cuidado sostenible para clientes que viven con demencia

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Resumen. El artículo presenta un análisis teórico exhaustivo sobre los problemas clave, desafíos y necesidades de los trabajadores de servicios sociales que atienden a personas que viven con demencia. El texto se centra en los cambios demográficos en Europa que están aumentando la proporción de personas mayores en la población y, por ende, el número de clientes que requieren cuidados exigentes. Los temas principales del texto incluyen la importancia de los mecanismos de apoyo, como la supervisión, el desarrollo profesional, las condiciones laborales y la prevención del agotamiento profesional. Asimismo, el artículo aborda temas como programas de formación, tecnologías modernas y una cultura organizacional que fomente el trabajo en equipo y la salud mental de los trabajadores. Se enfatiza la creación de medidas sistémicas para mejorar el entorno laboral, conduciendo a una atención de mayor calidad y a una mayor motivación de los empleados.

Palabras clave: servicios sociales, demencia, prevención del agotamiento, condiciones laborales, desarrollo profesional.

Support mechanisms for social service workers: pathways to sustainable care for clients living with dementia

Abstract. The article provides a thorough theoretical analysis of the key issues, challenges and needs of social service workers caring for people living with dementia. The text focuses on demographic changes in Europe that are increasing the proportion of older people in the population and thus the number of clients requiring demanding care. The main themes of the text are the importance of support mechanisms such as supervision, professional development, working conditions and the prevention of burnout. The article also works with topics such as training programs, modern technology, and organizational culture promoting teamwork and mental health of workers. Emphasis is placed on creating systemic measures to improve the work environment, leading to higher quality care and employee motivation.

Keywords: social services, dementia, burnout prevention, working conditions, professional development.

INTRODUCTION

The demographic structure of the elderly in Europe has been undergoing significant changes in recent decades, with far-reaching implications for the social, economic and health systems of individual countries. Population ageing is characterised by an increasing proportion of people aged 65 and over in the total population, due to a combination of low fertility, increasing life expectancy and other demographic factors. According to Eurostat's interactive publication *Demography of Europe - 2023 edition*, the proportion of people aged 65 and over in the European Union will increase from 16% in 2002 to 21% in 2022. This ageing trend is evident in most EU Member States, with some countries facing a more significant increase in the proportion of older people than others.

Italy and Portugal have the highest proportion of seniors in Europe, with 24% of the total population aged 65 and over in 2023. This high share can be partly attributed to low fertility, high life expectancy and limited migration of the younger population. Countries such as Bulgaria, the Czech Republic and Finland followed with only slightly lower shares of the elderly. These countries also face similar challenges, including demographic ageing and increasing demands on pension and healthcare systems. The average share of the population aged 65 and over in the European Union was around 21.3% in 2023. This average masks significant differences between Member States. Countries with higher incomes and better health systems tend to have longer life expectancy, which increases the proportion of older people. At the other end of the spectrum (the lowest proportion of elderly), countries such as Iceland, Luxembourg and Turkey had a proportion of less than 15%. These countries have a younger demographic structure, which may be the result of higher fertility rates, lower life expectancy or higher rates of immigration of younger people. In the case of Turkey, the relatively young population plays an important role (Statista, 2023).

So not only is there an increase in the number of seniors every year, but also an increase in the number of people with dementia. Every year, the number of people diagnosed with dementia increases by 5.4% in the Czech Republic and in Europe in general. Every 20 or 25 years, this number doubles (Holmerová, Horecký, & Hanuš, 2016). This aspect has and will undoubtedly continue to have a major impact on society, not only in terms of economic but also social impact. Therefore, the social services system will be forced to implement fundamental changes, whether in the system of financing, legislation, quality of services, material and technical equipment or personnel standards.

In the Czech Republic, a total of 17 856 people, of whom 12 478 were women (i.e. 70%), 5 376 were men and 2 were children or young people under the age of 18, stayed in residential social services for people living with dementia in 2017. The number of clients in residential care homes is on an upward trend, but unfortunately this is also true of the number of unfulfilled applications. While in 2013, the Ministry of Labour and Social Affairs of the Czech Republic registered 15,488 unsatisfied applications, in 2017 the number of unsatisfied applications was already 22,348, and the number of unsatisfied applications thus significantly exceeded the number of clients placed in homes with special regime (Wija, Bareš, & Žofka, 2019). The increasing trend in the number of beds in homes with special regime is also evident in the Register of Social Service Providers of the Czech Republic (Register of Social Service Providers, online, citation 2024-12-20), which is managed by the Ministry of Labour and Social Affairs of the Czech Republic, where there are more than 400 providers of registered social service homes with special regime with a total capacity of 23 674 beds.

In the context of statistical data in the context of social service workers themselves, we can publish data from Horecký (2020), who states that there are 11 million workers in the social services sector in the European Union, which represents 4.7% of all jobs in the European Union. It is also one of the most dynamically growing sectors. Over the last 10 years, 2 million new jobs have been created in social services on a European scale, and the Czech Republic has lagged somewhat behind in this significant growth. Even the overall data on the number of employees in social services in the Czech Republic varies. According to a 2019 analysis by the Ministry of Labour and Social Affairs of the Czech Republic, there are a total of 75,656 FTEs in social services in the Czech Republic. According to Eurostat, the total number of people working in social services in the Czech Republic is 105,100. Working in social services is the domain of women in all European countries. In terms of employees, women represent 81.56 % of the total workforce. In two countries (Portugal, Slovakia) the figure is even over 90%. The highest proportion of men working in social services can be found in Germany, 24.8%. The 50-64 age group represents one third of all workers in the social sector in the Czech Republic (Horecký, 2020).

The professional relationship and responsibility in providing quality care is closely related to the ethical behaviour and actions of the personal assistant. The organisation - the social service provider - delegates a specific relationship, the relationship of care with the user, to a specific professional worker, in our case the personal assistant. However, the responsibility of the institution/provider for quality care does not end here. The whole of the organisation should still support the work of the worker. The joint responsibility for team care implies a definition of the role of the worker and the institution. This can be directly operationalised in concrete measures that motivate the worker in his work: salary, job and administrative support. The institution is content-friendly, that is, it has ownership of the content commitment, and this is recognised in its policy. This implies not only ensuring quality care for the social service user, but also ensuring that the institution cares for the worker. Only in this connection can shared responsibility take its proper shape. Quality care

and support from the organisation, provide the worker with the background to carry out his direct work with the user (Laan van der, 1998).

Such support requires both time and quality - this means freeing up time for induction and job interviews, supervision, and the possibility of training and other types of professional development and further education. This offer cannot be 'non-committal' given that the institution as a moral actor has to bear its own share of responsibility for quality care. The institution shapes its own responsibility for quality care through the content of executive leadership. Increasingly, the starting point for the provision of quality care is the specified demand of the care seeker. This requires a different way of thinking for helpers and caregivers who both assess demand and try to match it to the care seeker. This means asking:

“What type of care seeker is contacting me and what is their real request?”

The development is also related to sufficient attention in dealing with psychological problems in all users and to the increased use of compensatory aids. Accepting the idea that work is satisfying, fulfilling and part of the meaning of life becomes a guide to identifying with work and accepting it as one's own. The nature of the work, together with the individual's personality and social factors, can positively influence identification with the occupation. Jurovsky (1980) and Laan van der (1998) agree that a worker identifies more easily with a job that is varied, with feedback and with the opportunity to participate in decision-making.

A frequently addressed topic in the context of clients and social service workers is social isolation. Social exclusion is discussed by Daněk, Klugerová (2023). Social exclusion is a major issue that modern society is attempting to address. It has negative impacts not only on a local level but also on a national, European, and even global scale. In today's interconnected society, it is important to recognize that social exclusion issues in other countries or on other continents will have an impact on us. Therefore, it is crucial to strive for the elimination, prevention, and combat of social exclusion through all possible means. Cooperative learning, which replaces traditional competitiveness, plays a crucial role in strengthening social bonds among students and developing their collaborative skills (Bačová, 2024).

In view of the above data, it is evident that it is essential to give maximum support and care to people who provide direct care to the elderly/people living with dementia. In the context of our professional text, these are social service workers, whose work is physically and mentally demanding, and it is therefore important that employers work with the idea of development, but above all with support mechanisms that will serve as a supportive apparatus of help and support for the performers of this difficult work.

RESULTS AND DISCUSSION

Control-functional support mechanisms/tools for social work

Social service workers often have to deal with difficult situations that are physically and mentally demanding. They are often subjected to a high workload that is also emotionally exhausting. Many times, the workplace is not equipped with the necessary tools for the work and lacks, for example, the modern tools needed to handle clients appropriately. Clients living with dementia in the residential social service are in the facility because of their unfavourable social situation, their health

condition is gradually deteriorating and the assistance and care for these people is very demanding. During the course of their services, the workers are confronted with various situations that can be triggered by both the client and family members.

A social services worker meets clients in palliative care on a daily basis, takes on the role of a companion or provides support to a family member in difficult moments. The social services worker also routinely encounters non-standard client behaviour. This can range from restlessness to aggression, caused by different types of illness. Thus, it can be said that the risk factor is undoubtedly the workplace environment and the type of clients the worker cares for. High workloads and the demands of the work can lead to isolation from one's own environment. This isolation can result in a negative impact on their social and emotional support. High demands are placed on social service workers and it is essential that they are equipped not only with practical skills but also with the ability to deal with situations that are emotionally challenging. If they are not adequately trained, it is possible that they may have problems when dealing with difficult situations and may also be exposed to high levels of stress (Kopecká, 2011).

In addition to the risk factors already mentioned, there are a number of other factors that increase the risk of burnout and psychological difficulties in social service workers. These include low motivation and job satisfaction, limited opportunities for development and professional growth, conflict and tension in the work environment, lack of self-care and low levels of personal rapport, unclear job requirements and job insecurity. It is extremely important for employers, managers and social service workers to recognize these risk factors and try to prevent and minimize them in order to prevent burnout syndrome and psychological difficulties in workers (Maroon, 2012).

We will not focus here on specific factors that can negatively affect social service workers in their work - the performance of care for social service users living with dementia, where we can include, for example, psychological stress, stress or burnout syndrome. The aim is to highlight support mechanisms that can help to cope with the above mentioned factors.

Supervision is undeniably important not only in the professional but also in the personal life of social service workers as well as other actors in the helping professions. It does not matter whether we perceive it as an individual or group tool for support and assistance. The question still remains the introduction of supervision processes into everyday professional reflection, not only in social work, and the realization of managers that it is an adequate tool that can ensure the quality of social services and the professionalism of workers, which is always mentioned.

Mahdalová (2018) defines the most important ideas of supervision:

- increasing the value of social work for clients and increasing the professionalisation of care processes;
- professional support for staff using supervision with regard to their competence development;
- supervision is to help increase one's own possibilities and abilities;
- The supervisor should provide the basic conditions of supervision: warmth, respect, genuineness, empathy and understanding;
- every professional needs supervision;
- if the client's well-being is at stake, other tasks fall by the wayside.

Úlehla (2005) views supervision in the context of social work as an asset that is not only beneficial to organizations but also to the workers themselves, not only social workers but also social service workers and other managerial actors. It also helps to clarify the mission of the workplace and the organization, to prevent overwork, to prevent burnout syndrome, and to help effectively manage feelings of powerlessness and guilt. It then also improves the services offered to clients and the reputation of the organisation.

The view of the importance of supervision and its perception or necessary place in the environment of helping professions in particular, but also specifically in social services can be supported by appropriate research.

In Social Services - Webb, Wilkins, & Martin (2022) aimed to explore how decisions are made during supervision of work with children and families, within a child welfare agency in England. The main aim of the study was to identify the various factors that contribute to decision making in this context, including the role of supervision, the influence of organisational culture and the impact of individual factors. Secondary aims of the study included exploring the decision-making process, identifying factors that influence decision-making and exploring the implications of these findings for practice. The authors conducted a qualitative study using semi-structured interviews with social workers and supervisors working in the field of child and family work. Data were analysed using thematic analysis, which involved identifying and interpreting patterns in the data. Specific research outcomes include describing the decision-making process in supervising work with children and families, identifying factors that influence decision-making, and exploring the implications of these findings for practice. The study found that decision-making in supervision of work with children and families is influenced by a variety of factors, including the nature of the case, the expertise of the social worker, and organizational culture. The authors conclude that understanding these factors is key to effective decision-making in this context.

Williams (2022) focuses on exploring the role of attachment theory in the emotional and psychosocial context of social work supervision. The main aim of the study was to explore how attachment theory can inform social work supervision practice, particularly with regard to the emotional and psychological well-being of social workers. The sub-objectives of the study explored applications of attachment theory in social work supervision, identifying ways in which attachment theory can inform supervision practice, and examining the implications of these findings for social work practice. The author used a literature review methodology to explore the role of attachment theory in social work supervision. A wide range of literature, including theoretical and empirical studies, was reviewed to identify key themes and concepts related to attachment theory and social work supervision. Specific outcomes of the research include exploring the relevance of attachment theory in social work supervision, identifying ways in which attachment theory can be applied to inform practice and exploring the implications of these findings for social work practice. The study found that attachment theory provides a useful framework for understanding the emotional and psychosocial needs of social workers in supervision and can inform the development of more supportive and effective supervision practices. The author concludes that understanding attachment theory is essential for social work supervisors to create a safe environment for social workers in supervision, promote their emotional well-being, and enable them to provide better quality care to clients.

In health care - Kilminster and Jolly (2000) focused their scholarly research on clinical supervision, which plays a vital role in postgraduate and, to some extent, undergraduate medical education. However, it is probably the least researched, discussed and developed aspect of clinical education.

The main aim of the study was to identify the various factors that contribute to effective supervision in the clinical setting. The sub-objectives of the study were to identify the different models of supervision used, to evaluate the effectiveness of supervision and to identify the characteristics of effective supervision. The authors conducted a systematic review of the literature related to supervision in clinical settings. The study found that effective supervision is characterized by clear goals, feedback, support, and a focus on learning and development. The authors concluded that effective supervision is essential for developing clinical competence and providing quality care. Feedback is essential and must be clear. It is important that the trainee/worker has some control over and input into the supervision process. Finding sufficient time for reflection can be a challenge. Trainee/worker behaviours and attitudes towards supervision need more investigation; some behaviours are detrimental to patient care and learning. Current supervision practice in medicine has very little empirical or theoretical basis.

Working not only in social services, but also in health care or education brings many challenging or unexpected events. In order not to perceive these professions in a negative way, it is evident that helping professions undoubtedly bring joy, a sense of happiness, success and other positive emotions, but in the context of the focus of this thesis it is necessary to describe and highlight the risks of these professions. Emotional distress is therefore an integral part of the helping professions as is the appeal to the professionalism and erudition of workers. Equally important, then, is the mental balance that helps us to cope with everyday moments with a certain detachment and professional outlook that has a human touch and warmth. However, for this we need diverse sources of support and assistance, whether in the private or professional sphere (Venglářová, 2013).

Mahdalová (2018) highlights the importance of relationships. The relationship between the supervisor and supervisee should be based on trust and openness to achieve good supervision, so that there is an open space for sharing/submitting information, establishing a good contract, working consciously with ethical issues and creating a safe place of support and acceptance.

An important idea is highlighted by Ivzhenko (2020) when he describes a supervisor as a professional in the helping professions who has several years/long term professional experience in direct interaction with people and with team leadership. Thus, the main task is to help workers in their work and also in its reflection. This role of a supervisor is not to be confused with that of a manager.

In view of the above, the most important thing is the ability of the supervisor to have an overview of the given/particular problem and to have an optic of complexity.

Professional and personal development

Vocational education can be defined as „a planned process of modifying attitudes, knowledge and skills through learning to achieve effective performance in a particular activity or set of activities. It aims, from a work perspective, to develop an individual’s capabilities and to meet the present and future workforce needs of the organization“ (Armstrong, 2007, p. 531).

Armstrong (2007) further states the objectives of vocational education, which are mainly to develop the competencies (skills and abilities) of workers. Through this process, their job performance should be improved. It also offered an opportunity to the employees that when human resources are needed in the organization, the existing employees should be primarily approached and thus selection from internal sources should take place. The necessity of saving time and financial costs that are required in adapting and training a new employee. However, it is evident from these specific objec-

tives that only the aspect of benefit to the organisation was used in defining them, which is not an appropriate strategy in the field of social services, as the needs of employees are also expected to be taken into account and preferred. However, the objectives of vocational training are much broader. Therefore, Armstrong (2007) goes on to point out that it is not just about meeting the needs of the organisation, but there is also a meeting of needs at the level of the workers themselves who must be participants in professional learning and development.

Hronik (2007) views the issue of employee development and training as a kind of assessment of the state of harmony and disharmony. It is all based on the identification of learning needs that are implemented in four core areas of the worker, specifically the areas of what the worker CAN - KNOWS - CAN - WANTS. The identification of learning needs thus implemented is to be built on the partnership principle of superior and subordinate, with the aim of finding a common solution.

According to Bednar (2012), all employees in an organisation represent its wealth. It is essential to work with employees, motivate them to develop and encourage them to gain further professional experience, which constitutes their professionalism. Furthermore, Bednar (2012) points out that the training and development of employees in an organization has a great influence, or even dependence, on the quality of the social service offered and provided. Employees are the actors that create the quality of social service. Even the Social Service Quality Standards themselves highlight and work with this idea to define the staffing of a social service, this is specifically standard number 9. a 10.

Quality standard for social services number 9 - *“Personnel and organizational provision of social services”* - The so-called personnel quality standards, or people management systems and processes, are areas that every employer must have thought through, regardless of whether or not they provide social services at all or how many. In the social sector, this issue is all the more challenging because it also takes into account the qualifications of the people who provide the social service. This is highlighted by Sections 109 and 110 of the Social Services Act, which define the activities and qualifications of a social worker, and Sections 115 and 116, which, among other things, define other workers who may perform social services, in particular the position of social services worker. However, other persons, mostly volunteers and trainees, may also cooperate in the provision of social services and their activities are subject to the obligations of the social service provider ... (Act No. 108/2006 Coll., on social services, as amended). In order to ensure the fulfilment of the personal goals of social service clients, it is necessary to have an adequate number of competent staff. Within each job position it is necessary to have a job profile, a list of requirements of the abilities and skills (competences) of the worker who is in this position. The aim is not just to have a defined job description, but expectations in the form of outputs and outcomes with requirements for knowledge, behaviour ... necessary to meet the requirements and expectations of the employer/social service provider.

Quality standard for social services number 10 - *“Professional development of employees”* - another of the so-called personnel standards and concerns the professional development of employees of the service. It instructs the social service provider to deal with the issues of wage/salary valuation of employees, but also the issue of non-financial motivation. It addresses information exchange rules as well as independent expert support. This can be not only a supervisor, but also, for example, a lawyer, a doctor or a clergyman, if the service needs such an expert for its support for various reasons (Veškrnová, Sladká-Ševčíková, 2013). Although social service workers in the context of social worker have different nature of their work, as well as the actual job description, or legislative requirements for the exercise of their profession, they have similar educational obligation in the course of their profession. We can thus speak of professional development.

The aim is to support the idea of professional development, which is based on the mutual cooperation of the employer and the social services worker/employee, where both parties want to work on the development and, for example, specialization for the given target group within the framework of improving the quality of the provided social service. With regard to the focus of our thesis, it is precisely the target group of seniors with dementia, where specialist courses are offered that have a diverse overlap from communication to therapeutic techniques in the context of the target group.

The above idea is described in general terms by Bednář (2012), who describes a variety of options in the field of education, which can be self-directed learning, distance learning, project work, on-the-job training, development of skills and competences that improve the work performed and expand professional competence. Personally, we would also add a process of sharing experiences under the guidance of experts or managers, where sharing „good and bad“ practices is a convenient development technique that does not place demands on the participants of the sessions.

The Professional Union of Social Workers in Social Services conducted a social survey in 2016-2017 (140 respondents), where social workers and social service workers were interviewed on the development and support of lifelong learning. In moha cases, the system of accredited courses or long-term training programmes is successful. This model of lifelong learning provides an extensive range of areas of social work, and in these it is possible to expand one's professional knowledge and skills in a committed way. On the positive side, these courses, seminars and training programmes reflect the current demands of social work development and have the capacity to adapt in terms of content and availability. As a result, staff are able to respond to the demands of the professional and lay public, while being able to respond equally to the demands of the client or their worsening social situation. A properly configured system of lifelong learning can support the client in feeling his or her own professional values and professional self-esteem. At the same time, it can also be said that with the growth and development of social work in the Czech Republic, the continuing education of social workers has successfully managed to configure these systems, even in the context of the requirements of current events and needs (Tajanovská, 2018).

Thanks to the systematic process of professional training and development of social service workers, it is also possible to find incentives for this process not only from the employees themselves, but also from the clients themselves. The training process, with regard to practicality and real applicability, should be built on a degree of interactivity and practicality. As in other areas, the motivation of social service workers plays a major aspect.

According to Rezlerová (2008, p. 49), an essential fact that affects the whole process of professional education and development is the awareness of social service workers that without further education it is impossible to keep in touch with technical development, but also with social development. “Everyone should take responsibility for their own professional growth. Without it, its added value and at the same time its “price” on the labour market will decrease.”

Without professional training not only of social service workers, it would not be possible to develop them, to increase their quality and, last but not least, to increase the social recognition of social service workers. Further training can help to develop the above-mentioned personal prerequisites for the profession. It also contributes to finding a certain personal balance and defining boundaries - in relation to clients and in relation to the employer (Stárek, Klugerová, & Víšek, 2023).

A social worker should have a wide range of competencies and qualities that enable them to perform their work effectively and successfully. Patience and empathy are indispensable character

qualities. Patience and empathy is a key tool in being able to empathise with a person suffering from Alzheimer's disease or other types of dementia, as these clients are more difficult to express their needs and requirements. The social worker must be able to listen to these clients in order to provide adequate support and assistance (Holmerová, Jarolímová, & Suchá, 2009).

Another indispensable competence is knowledge of communication techniques. Clients who suffer from one of the types of dementia experience gradual changes in their ability to use verbal expressions. Along with this, these clients also lose the ability to understand the meaning and sense of partial words and in the last stage they stop communicating altogether. It is therefore essential for the social worker to be able to read what the client is trying to communicate, whether verbally, through facial expressions or body movements (Koběřská, 2003).

The concept of education aims to improve the quality of services provided. The acquired knowledge can then be implemented in everyday practice. Direct care workers who care for clients with Alzheimer's disease or other types of dementia can take training courses in the context of the target group. Courses can focus on understanding the progression of Alzheimer's disease, communication in the different stages of the disease or non-verbal techniques, for example.

Organisational culture is one of the key components influencing the functioning of any organisation, including those operating in the field of social work. This concept encompasses the set of values, normative beliefs, traditions and practices that determine the way an organisation functions and how its members work together. Organizational culture provides the foundation upon which other processes are built and determines what will be done and how it will be done in a given organization (Schein, 2010).

A strong organizational culture is the foundation for the development of a "learning organization" that supports individuals in their ability to learn and adapt to change. The concept of a learning organisation, as described by Senge (2006), involves processes whereby employees actively take responsibility for their own learning and development. This approach enables individuals to not only learn new skills and knowledge, but also to critically reflect on their practice and seek new solutions. It is therefore essential to focus attention on the learning processes in an organisation that take place on a day-to-day basis and have the potential to significantly impact on work effectiveness.

The culture of an organisation significantly influences the collective identity of employees. Castells (2011) defines collective identity as a group of individuals who share a common goal and declare their self-definition based on what they do and what they want to be. Similarly, Frost (2007) describes collective identity as shared hopes and dreams shaped by shared experiences and history. This shared identity involves not only reflection on the self but also a desire to create values that contribute to the development of the organization. In the context of social work, Musil et al. (2019) highlight that social workers often share common ideas and values that are either internally accepted or acknowledged as a tool to achieve organizational goals. This process creates a framework for coordinating and motivating employee behaviour.

Leading the constitution of an organizational culture is primarily the responsibility of management. Top managers have a key role in promoting and reinforcing the values that form the basis of organizational culture. Their role involves the clear communication of these values, their emphasis and application in daily practice (Kotter, 1996). Leadership by example and regular communication with employees are essential to creating a supportive work environment that fosters both personal and professional development.

Creating a learning organisation culture in social work can contribute to fostering trust and openness among staff, which has a direct impact on the quality of services provided. At the same time, it should be taken into account that informal learning, which takes place during the daily interaction between team members, plays an important role. It is this form of learning that can promote the sharing of knowledge and skills that would otherwise go unused.

In conclusion, organizational culture and learning organization culture are inextricably linked to the effectiveness and quality of social work services. A key factor for success is the active involvement of all organizational participants in the learning process and the sharing of values that support long-term development. It is essential that the leadership of the organisation pays attention not only to formal learning but also to creating an environment that encourages open dialogue, collaboration and reflection.

Recommendations for practice

Based on the content of the above text, we recommend the following practical measures to complement the text to make it useful for both academic and practitioner audiences:

1. Introduction of regular supervision: is a key measure to support social workers who are faced with emotionally and physically demanding situations on a daily basis. Supervision is not only a tool for reflecting on work experiences, but also a space for sharing problems, finding new solutions and strengthening collegiality among staff. Individual supervision allows workers to focus on specific cases they encounter during their practice and to reflect on their actions and attitudes. In this process, the supervisor acts as a support, providing feedback, suggesting possible solutions and motivating further professional growth. Group supervision then creates a platform for sharing experiences between team members, fostering mutual trust and providing reassurance that they are not alone in their problems. The supervision process should be led by a qualified supervisor who has expertise and skills in supervision and counselling. It is also important to create a safe environment where workers can talk openly about their problems while finding effective ways to manage emotional stress. The organisation should regularly evaluate the effectiveness of supervision and ensure its continuity in order to make a long-term contribution to improving the quality of service delivery. Incorporating supervision processes into routine practice can significantly reduce the risk of burn-out and increase staff motivation. It strengthens their ability to cope with challenging situations and at the same time supports their professional self-reflection. Therefore, the introduction of regular supervision is not only a prevention of psychological exhaustion, but also a tool for improving the overall atmosphere in the workplace.

2. Tailor-made training programmes: are an essential element for strengthening the expertise of social service workers and ensuring the quality of care provided. These programmes should be designed to meet the specific needs of staff and clients. One of the key areas of training is stress management techniques, which help workers to reduce psychological stress and improve their ability to respond effectively to crisis situations. Courses focusing on communication with clients with dementia provide practical tools to improve verbal and non-verbal interaction, especially during the difficult stages of their illness. Workshops on crisis intervention are also an important part of the course, teaching how to manage unexpected situations and provide adequate support to clients and their families. Training programmes should be interactive and include practical scenarios that allow staff to apply the knowledge they have gained in real-life situations. It is also important to create an environment for sharing good practice where staff can share their experiences with each other

and seek inspiration to improve their practice. The organisation should regularly assess the needs of its workforce and adapt training activities to current challenges. Involving subject matter experts, including psychologists, therapists and specialist trainers, can contribute to the quality of training courses. The availability of these programmes is also an important aspect, so that as many employees as possible can participate in training without overburdening their working time. Regular participation in training programmes not only increases the professional competence of staff, but also their confidence and motivation. This approach promotes professional development and contributes to building a culture of continuous learning within the organisation. The end result is not only a happier workforce, but also a higher quality of care provided to clients.

3. Supporting the mental health of: social service workers is key to ensuring their long-term work capability and overall satisfaction. Employers should create a system that allows employees easy access to professional counselling, psychologists or therapists. This system should include not only regularly available services but also crisis support for situations where workers face acute stress or emotional exhaustion. The psychological strain of working with clients on a daily basis often leads to burnout syndrome, which can negatively affect both the health of workers and the quality of care provided. The availability of professional help is particularly crucial in settings where workers face challenging interactions with clients with dementia or other complex diagnoses. In addition to individual therapy sessions, it is advisable to introduce group sessions aimed at sharing experiences and mutual support. These meetings can foster collegiality and create a space for open discussion about challenging situations that staff face. Mental health promotion should be integrated into the organisational culture so that employees see mental health care as a natural part of their work. In addition to professional support, it is important to organise workshops on stress management techniques and mindfulness to help workers cope better with everyday challenges. Investing in the mental health of employees will translate into higher productivity, lower absenteeism rates and higher employee satisfaction in the long term.

4. Flexible working conditions: are a necessary step towards creating a healthy working environment that meets the individual needs of social service workers. Shorter shifts can significantly reduce the physical and mental strain on workers, which is particularly crucial in demanding professions such as dementia care. Shorter working hours allow staff to better balance work and personal life, which contributes to their overall satisfaction and motivation. Another element of flexibility is the possibility of individual shift planning. This means that employees can better adapt their working hours to their personal needs, such as caring for their family or studying. These measures not only improve work morale but also reduce the risk of absenteeism and turnover. Ensuring sufficient staffing is also a key aspect of flexible working arrangements. Adequate staffing allows the workload to be spread out and ensures that each employee has sufficient time and energy to perform their tasks. This is particularly important in environments where staff face high stress and challenging client situations. Introducing flexible working arrangements requires changes in organisational management, including rethinking existing processes for shift planning and communication with staff. However, investing in these changes will pay off in the long run as they contribute to greater efficiency, employee satisfaction and quality of service.

5. Technological support: the introduction of modern aids and technologies into the social services environment is a key step in ensuring more effective and safer care for clients, especially those with limited mobility or specific needs. Working in social services is often physically demanding and can have a long-term negative impact on workers' health, which modern technology can

significantly minimise. One of the most important areas of technological support is the introduction of aids for handling clients. Height-adjustable electric beds, ceiling lifting systems and mobile hoists greatly facilitate the movement of clients and minimise the risk of injury to workers. These aids not only improve the physical safety of staff but also increase the comfort of clients, who can be moved with greater dignity and care. Another example is the use of anti-kneeling mattresses, which help prevent health complications for clients with limited mobility. However, technology is not limited to physical care. Modern communication systems enable more effective team coordination and rapid response to crisis situations. For example, the use of electronic shift scheduling and care recording systems simplifies administrative tasks and allows staff to focus more on the actual care of clients. In addition, mobile apps can be deployed to monitor clients' health status or smart bracelets that monitor vital signs, improving the prevention of health complications. Investing in technological support also has a significant impact on the long-term sustainability of the social services workforce. Less physically demanding work contributes to lower staff turnover and makes the sector more attractive to new workers. Organisations should therefore seek to regularly upgrade their equipment and train staff in its use. Technological support not only improves working conditions, but also contributes to higher quality and efficiency of service delivery, which is key to ensuring decent care for clients.

6. Promoting teamwork: is one of the most effective tools for improving the working environment in social services. Working in this sector is often emotionally and physically demanding, which highlights the need for a strong and cohesive team that can face daily challenges together. Regular team meetings play a key role in this respect, providing a platform for open communication, sharing of experiences and mutual support. Team meetings allow staff to discuss the challenging situations they face and to find common solutions. These meetings can be structured to include both a reflective part aimed at evaluating current practice and a creative part where employees can suggest innovations and improvements to working conditions. Sharing best practices that can inspire other team members is also an important element. The promotion of teamwork should be systematic and include regular training sessions aimed at developing soft skills such as effective communication, conflict resolution and trust building. These skills are key to creating a harmonious working environment and preventing potential misunderstandings or disputes. It is also advisable to introduce team-building activities that strengthen relationships between team members and contribute to a better atmosphere in the workplace. Transparent communication from the organisation's management is also an important part of promoting teamwork. Managers should regularly inform employees about strategic goals, planned changes and other key issues that affect their work. Open dialogue between management and employees builds trust and motivation. Fostering teamwork has a direct impact on the quality of service delivery. A cohesive team is better able to respond to clients' needs, coordinate activities and deliver care at a higher level. Therefore, investing in building team spirit pays off in the long run not only for staff, but especially for clients who benefit from higher quality and more efficient care.

Rewarding staff: creating a system of recognition and rewards for a job well done is key to the motivation and long-term satisfaction of staff in social services. Working in this sector is often physically and mentally demanding, so it is important that employers actively recognise the commitment and contribution of individual workers. Recognition is not just a financial reward, but includes a wide range of measures that can improve the overall quality of working life. Financial benefits, such as special bonuses, pay increases or the provision of training allowances, are an effective way of

motivating employees and showing them that their work is valued. Educational allowances can be used for professional development, such as training courses or certifications, which also improves the quality of service provided. Another example is the possibility of using financial rewards to cover personal expenses such as health care or transport to work. Non-financial benefits play an equally important role. These include recognition in the form of public praise, awards or the possibility of extra time off. Such actions promote a positive atmosphere in the workplace and increase employee loyalty. Employers can also introduce programmes aimed at promoting work-life balance, such as flexible working arrangements or support for sports and leisure activities. The reward system should be transparent and fair so that employees are aware of the criteria by which they are rewarded. It should also be flexible enough to respond to individual needs and preferences. Regular communication about staff achievements and contributions creates an environment where staff feel valued and motivated to develop. Recognition of employees is not only a tool for motivation, but also a way to increase their professional self-esteem and overall satisfaction.

Establish a workload monitoring system: the establishment of a physical and mental workload monitoring system is essential for the early identification of problems and their effective resolution. Working in social services involves high demands on the physical fitness and mental resilience of workers. Without regular workload assessments, there is a risk of overwork, burnout or even serious health complications. The monitoring system should include regular questionnaires and assessments focusing on physical health, mental well-being and working conditions. These tools provide a comprehensive overview of the workplace situation and identify areas that need immediate attention. The system should also include regular discussions between employees and their supervisors where problems can be openly discussed. Technology solutions such as digital applications or online platforms can facilitate this process. For example, health monitoring apps can offer workers recommendations based on their current condition and highlight the need for rest or consultation with a specialist. This data can be further used to optimise work schedules and shifts to avoid overworking employees. Follow-up intervention based on the findings is also an important aspect. If the assessment shows that employees are facing excessive workload, the organisation should immediately take measures such as adjusting working hours, strengthening the team or offering professional support. Regular training and workshops on stress management techniques can be another effective tool for reducing psychological strain. Implementing a stress monitoring system contributes to the long-term sustainability of the working environment and increases employee satisfaction. A transparent approach to stress assessment also builds trust between employees and management. This system is not only a prevention tool, but also a means of improving the efficiency and quality of service delivery, which is key to the long-term success of the organisation.

CONCLUSION

The issue of work stress and excessive workload of social service workers is a major challenge for maintaining the quality of care for clients with dementia. Demographic changes and the growing number of seniors with cognitive impairments are placing increasing demands on social workers, which requires the implementation of systemic measures to support their mental and physical health. Organisations have a key role to play, as they are responsible not only for the quality of client care but also for creating a supportive working environment.

Regular supervision, tailored training programmes and access to professional counselling are effective tools for managing the burden. The introduction of modern technology and tools can reduce the physical demands of work, while flexible working conditions can contribute to a better work-life balance. Strengthening collegiality and teamwork is also key, creating space for sharing experiences and mutual support.

In conclusion, it is clear that without targeted support for staff, it is not possible to provide long-term sustainable care for clients. It is imperative that organisations approach problems systematically and with an emphasis on burnout prevention and professional skills development. Improving working conditions will not only improve the quality of services provided, but also promote staff satisfaction and motivation, which is a key factor in the success of social services.

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Distintas visiones económicas de la gestión de comunidades vulnerables desde la perspectiva del trabajo social

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Resumen. El objetivo general de este estudio fue describir distintas visiones económicas (visiones alternativas) en la gestión de comunidades vulnerables desde la perspectiva del trabajo social, buscando comprender en cada momento como estas miradas influyen en el desarrollo sostenible y en el bienestar de los grupos más desfavorecidos. La metodología empleada es de carácter fenomenológico y documental, lo que permitió explorar experiencias vividas y, simultáneamente, recopilar información relevante de fuentes documentales sobre prácticas exitosas a nivel internacional y desafíos en el trabajo social. Entre los resultados se destacan: 1) la identificación de estrategias efectivas que integran la economía solidaria y el trabajo comunitario, promoviendo un desarrollo sostenible y participativo; 2) el fortalecimiento del papel del trabajo social como factor mediador en la articulación de recursos y redes comunitarias, lo que podría resultar en una mejora significativa en las condiciones de vida de las comunidades vulnerables. Estos hallazgos contribuyen a la formulación de políticas públicas más inclusivas y adaptadas a

las realidades locales. En las conclusiones se afirma categóricamente que el trabajo social se establece como un puente epistemológico que conecta las visiones económicas alternativas con las realidades particulares de los grupos vulnerables.

Palabras clave: visiones económicas, gestión de comunidades, trabajo social, intervención social crítica, comunidades vulnerables.

Different economic visions of the management of vulnerable communities from a social work perspective

Abstract. The general objective of this study was to describe different economic visions (alternative visions) in the management of vulnerable communities from the perspective of social work, seeking to understand at each moment how these visions influence sustainable development and the well-being of the most disadvantaged groups. The methodology used is phenomenological and documentary in nature, which allowed us to explore lived experiences and, simultaneously, to gather relevant information from documentary sources on successful practices at the international level and challenges in social work. The results include: 1) the identification of effective strategies that integrate solidarity economy and community work, promoting sustainable and participatory development; 2) the strengthening of the role of social work as a mediating factor in the articulation of resources and community networks, which could result in a significant improvement in the living conditions of vulnerable communities. These findings contribute to the formulation of more inclusive public policies adapted to local realities. The conclusions categorically state that social work is established as an epistemological bridge that connects alternative economic visions with the realities of vulnerable groups.

Keywords: economic visions, community management, social work, critical social intervention, vulnerable communities.

INTRODUCCIÓN

Todo indica que, el estudio fenomenológico de las distintas visiones económicas en la gestión de comunidades vulnerables, desde la perspectiva del trabajo social, significa un ejercicio reflexivo importante cuando se busca entender cómo se pueden abordar las desigualdades socioeconómicas, en el siglo XXI, mucho más cuando las grandes ideologías políticas como el marxismo y liberalismo ya no son suficientes. En este contexto, para pensadores de la talla de Razeto (2010), un enfoque que ha cobrado relevancia, por lo que representa para la justicia social, es el de la economía solidaria, el cual busca empoderar a las comunidades mediante la participación de sus miembros en la toma de decisiones económicas. Según un estudio reciente desarrollado en mujeres islámicas, pero aplicable a otros contextos distintos, la integración de prácticas de economía solidaria puede contribuir significativamente a mejorar las condiciones de vida en comunidades vulnerables, fomentando la autogestión y el desarrollo sostenible (Nur Azizah & Abdul Qoyum, 2019).

La metodología propia del trabajo social, centrada en las personas y su entorno, permite una comprensión más profunda (objetiva y subjetiva) de las dinámicas sociales que afectan a estas comu-

nidades en condición de vulnerabilidad estructural. En todo momento y lugar, el trabajo social debe adaptarse a las realidades locales y a las necesidades específicas de cada grupo. En este orden de ideas, las reflexiones sobre categorías centrales en el debate político internacional, sobre la innovación en la gobernanza social de la autoría de Conejero (2016), resalta cómo el trabajo social puede ser un catalizador para el cambio, promoviendo la participación comunitaria y, al mismo tiempo, creando redes de apoyo que fortalezcan la cohesión social en momentos de crisis.

Cuando se estudian visiones económicas alternativas de la gestión de comunidades vulnerables en una perspectiva civilizacional, con arreglo a las ideas de Nikitenko et al. (2023), es crucial considerar el papel del género en la gestión económica de estas comunidades. Más aún cuando, las mujeres, a menudo responsables del bienestar familiar, desempeñan un papel protagónico en el desarrollo económico local. La filósofa norteamericana Nussbaum (2012), muestra que al empoderar a las mujeres y fomentar su participación en actividades económicas productivas, se pueden lograr mejoras significativas en los indicadores de bienestar comunitario al tiempo que se fortalecen sus capacidades centrales. El enfoque de las capacidades humanas no solo beneficia a las mujeres, sino que también contribuye al desarrollo integral de sus comunidades.

En consecuencia, la interconexión entre los problemas sociales y ecológicos también es un aspecto relevante en la gestión de comunidades vulnerables, tal como sostiene Diamond (2007). La perspectiva eco-social del trabajo social enfatiza justamente la necesidad de abordar simultáneamente las injusticias sociales y ambientales. La visión post-antropocéntrica de las ciencias sociales argumenta que esta filosofía no solo es ética, sino también, una fuerza necesaria para enfrentar los desafíos contemporáneos, como el cambio climático y la pérdida de biodiversidad, que afectan desproporcionadamente a las comunidades más vulnerables, de conformidad con los objetivos para el logro del desarrollo sostenible, de la llamada agenda 2030 (Organización de Naciones Unidas, 2022).

Para Arbeláez-Campillo y Villasmil Espinoza (2020), la crisis provocada por la pandemia de COVID-19 ha puesto de relieve las desigualdades existentes y, por lo tanto, ha resaltado la importancia de construir resiliencia comunitaria. En cualquier democracia sustantiva, en términos prácticos, para fortalecer la resiliencia individual y colectiva resulta primordial trabajar en colaboración con las comunidades para mitigar los impactos sociales y económicos del virus. Este enfoque intersubjetivo y colaborativo, no solo busca restaurar el *statu quo* ante cualquier crisis, sino transformar las condiciones socioeconómicas hacia una mayor equidad, para apalancar la experiencia del desarrollo sostenible en personas y comunidades vulnerables.

Por estas razones, es importante reconocer que el trabajo social, como disciplina de síntesis, juega un papel estratégico en contextos específicos como los grupos en condición de emergencia humanitaria, donde las poblaciones marginadas enfrentan riesgos materiales y psicosociales elevados. En este contexto problemático, la investigación de Abrams (2020), revela cómo los trabajadores sociales pueden intervenir eficazmente para mejorar los resultados psicosociales en estas poblaciones vulnerables. Esto demuestra que una atención integral y especializada puede marcar una diferencia significativa en la vida de quienes enfrentan adversidades severas, adversidades potenciadas por las contradicciones de sociedades injustas y desiguales, comunes a la historia del sur global.

A manera de justificación del problema, abordar las distintas visiones económicas desde el trabajo social implica una comprensión holística que considere, simultáneamente, factores sociales, económicos y ambientales. La integración de enfoques innovadores y participativos es útil para pro-

mover el bienestar en comunidades vulnerables y contribuir a su desarrollo sostenible. Precisamente por estas razones, el objetivo de este estudio fue describir distintas visiones económicas (visiones alternativas) en la gestión de comunidades vulnerables desde la perspectiva del trabajo social, buscando comprender en cada momento cómo estas miradas influyen en el desarrollo sostenible y en el bienestar de los grupos más desfavorecidos. La metodología empleada es de carácter fenomenológico y documental, lo que permitió explorar experiencias vividas y, simultáneamente, recopilar información relevante de fuentes documentales sobre prácticas exitosas a nivel internacional y desafíos en el trabajo social.

El texto está dividido en cinco secciones particulares, pero al mismo tiempo conectadas en el esfuerzo de responder al objetivo planteado. En la primera parte, se muestran las bases filosóficas del artículo; en la segunda, el procedimiento metodológico; por su parte, la tercera sección muestra al lector el análisis y la discusión de los resultados obtenidos al calor de la investigación. Seguidamente se presentan las principales conclusiones y recomendaciones del caso, junto al índice de referencias citadas en orden alfabético bajo el estilo APA.

Bases filosóficas de las categorías: economías alternativas y comunidades vulnerables

En principio conviene recordar que, las ciencias sociales críticas desempeñan un papel fundamental en la promoción de los derechos humanos y en la mejora de las condiciones de vida de los grupos vulnerables, tal como afirma van Dijk (2009). Estas disciplinas generan conocimientos que buscan desmantelar las barreras estructurales que impiden el goce pleno de los derechos humanos a las personas vulnerables que viven situaciones objetivas de emergencia social.

A través de un enfoque crítico con múltiples opciones teóricas y metodológicas, las ciencias sociales críticas analizan, por lo general, las dinámicas de poder y desigualdad que afectan a estas comunidades, permitiendo así la formulación de políticas públicas más inclusivas y efectivas. En palabras de Camacho (2022), estas ciencias pueden contribuir a empoderar a los grupos vulnerables, facilitando las condiciones epistemológicas para lograr su participación decidida en la defensa de sus derechos y en la construcción de alternativas económicas sostenibles, en consecuencia:

La categoría “derechos humanos” no es inmóvil ni definitiva ni es la misma en toda circunstancia de espacio y tiempo. Más que una categoría general, es una dinámica de lucha por la dignidad de personas y grupos según el momento y el lugar. En ese proceso de lucha ha surgido la categoría de comunidades vulnerables para referirse a sectores que, por su subordinación cultural, económica y social están expuestos al desconocimiento e irrespeto de sus derechos y su dignidad (Camacho, 2022, p. 2).

Por su parte, el trabajo social se erige como la principal de las ciencias sociales críticas debido a su enfoque en la intervención social y su compromiso ontológico y político con la justicia social. A través de procesos de intervención crítica, los trabajadores sociales se unen con individuos, familias y comunidades para abordar las desigualdades y promover el desarrollo sostenible. Estas intervenciones, democráticas y consensuadas, son necesarias para generar experiencias que, por un lado, aborden las necesidades inmediatas y; por el otro, fomenten el desarrollo de capacidades humanas a largo plazo (Nussbaum, 2012). Por estas razones, los autores de este artículo enfatizan cómo el trabajo social puede ser un motor para el cambio social, ayudando a reducir asimetrías sociales y promoviendo una mayor equidad en el acceso a recursos y oportunidades.

Cuadro 1. Visiones y alternativas económicas.



Fuente: elaborado por los autores (2024).

En este orden de ideas, las ideas filosóficas de justicia y democracia sustantiva del economista Amartya Sen se constituyen en un aporte básico para entender cómo se pueden desarrollar economías solidarias. Sen (2009), argumenta que la justicia no solo debe medirse en términos económicos, sino también en la capacidad de las personas para llevar vidas plenas y dignas, más allá de la pobreza. Su enfoque en las capacidades, resalta la importancia de empoderar a los individuos para que puedan tomar decisiones significativas sobre sus vidas, de forma autónoma y responsable. En este sentido, su obra proporciona un marco teórico consistente para construir economías, postliberales y postmarxistas, que prioricen el bienestar humano por encima del crecimiento económico per se. Este planteamiento ha sido ampliamente discutido en investigaciones recientes que analizan su aplicación práctica en políticas públicas y en el desarrollo de economías solidarias:

La Economía Social y Solidaria (ESS) se entiende como un modelo económico cuyo funcionamiento se basa en la productividad de la sociedad mediante la colaboración de factores económicos dentro del sistema. Para Coraggio (2011), la Economía Social y Solidaria (ESS) es un sistema económico cuyo funcionamiento asegura la base material integrada a una sociedad justa y equilibrada. En otros términos, como explican Tapia y Alvarado (2019), la Economía Social y Solidaria, está explicada como un conjunto de iniciativas socioeconómicas, formales o informales, individuales o colectivas, que priorizan la satisfacción de las necesidades de las personas por encima del lucro (Muñoz, Cueva, Suárez, & Gomezjurado, 2022, p. 23).

Cuando se discuten las economías solidarias, el modelo de economía social de mercado se presenta como una herramienta valiosa para el desarrollo local, combinando principios económicos con valores sociales. Este modelo de origen alemán busca equilibrar la eficiencia económica con la equidad social, promoviendo un entorno sostenible donde las empresas privadas operan no solo con fines lucrativos, sino también, y esto es lo fundamental, con un compromiso hacia el bienestar comunitario. Al decir de Resico (2010), esta visión económica alternativa puede facilitar, bajo determinadas condiciones políticas y culturales, la creación de empleos sostenibles y mejorar la calidad de vida en comunidades locales al fomentar la cooperación entre diferentes actores económicos. Por lo tanto, la economía social de mercado se convierte así en un puente entre el desarrollo económico y la justicia social. Mas concretamente:

Desde el punto de vista de su fundamentación, este sistema se deriva de la idea inalienable de la dignidad de la persona humana, tal como queda consagrada también en la noción de derechos humanos. Un rasgo esencial de esta idea es la primacía del derecho sobre la fuerza, por lo cual todo el sistema económico, como así también jurídico y de gobierno, no puede basarse en la prevalencia del poder sino en la justicia. Estas notas básicas se han grabado a fondo en la experiencia alemana de posguerra como consecuencia del rechazo del fenómeno histórico del totalitarismo nacionalsocialista (Resico, 2010, p. 28).

En este debate al mismo tiempo político, económico e ideológico, Luis Razeto Migliaro propone un modelo de economía solidaria que enfatiza la cooperación y la solidaridad como pilares fundamentales para el desarrollo económico sostenible, de manera muy similar a la experiencia alemana de la economía social de mercado. En particular, este modelo se basa en principios como la autogestión, la equidad y el respeto por el medio ambiente, promoviendo una economía que no solo busca maximizar beneficios económicos, sino también fortalecer las relaciones comunitarias y democráticas en la gestión de los procesos económicos locales. La propuesta de Razeto (2015), ha sido objeto de diversos debates que destacan su relevancia para abordar problemas sociales contemporáneos, ofreciendo alternativas viables a los modelos económicos tradicionales que perpetúan desigualdades y deterioran sistemáticamente al medio ambiente.

En síntesis, las distintas visiones filosóficas para desarrollar economías solidarias convergen en su compromiso por promover justicia social y equidad (Razeto, 2010, 2015; Sen, 2010). En este marco doctrinal, las ciencias sociales críticas, lideradas por el trabajo social, son espacios para la reflexión y la acción para entender y transformar las realidades de los grupos vulnerables. De modo que, las ideas de Sen (2010) y Nussbaum (2012), sobre capacidades humanas ofrecen un marco teórico coherente que complementa modelos prácticos como la economía social de mercado y las propuestas de Razeto. En su conjunto, estas miradas tienen un doble propósito: primero, abordan las necesidades inmediatas de los grupos vulnerables y, segundo, buscan construir sociedades más justas y sostenibles en el siglo XXI. Por lo tanto, la integración de estos elementos conceptuales en una epistemología ecléctica es clave para avanzar hacia economías solidarias efectivas, que beneficien a todos los sectores sociales.

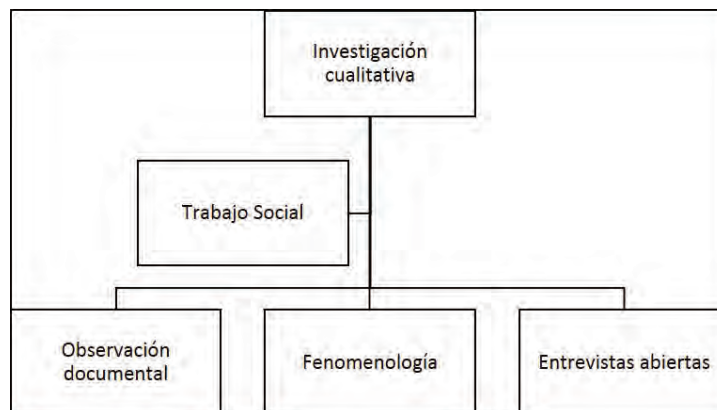
METODOLOGÍA

Tal como sostiene Martínez, (2004; 2009), la metodología cualitativa es una herramienta con capacidad para abordar el objetivo de investigar las distintas visiones económicas en la gestión de comunidades vulnerables desde la perspectiva del trabajo social. Este enfoque permite explorar en profundidad las experiencias, percepciones y significados que los individuos y grupos atribuyen a su realidad económica y social, en la intersección que bifurca y conecta la dimensión objetiva y subjetiva de toda realidad. En palabras de Moreno Olmedo (2008), la investigación cualitativa se centra en comprender el contexto y las dinámicas sociales que afectan a las comunidades en su vida cotidiana, lo que facilita una interpretación más rica de sus necesidades y aspiraciones. En este aspecto, la metodología cualitativa puede revelar visiones valiosas sobre la vida cotidiana de las comunidades vulnerables, permitiendo así un enfoque más centrado en sus realidades.

Más específicamente, la fenomenología, como parte de la metodología cualitativa, se enfoca al decir de Husserl (2008), en comprender las experiencias vividas desde la perspectiva de los actores sociales, es decir, desde la perspectiva diferencial de los protagonistas de su propia realidad. En el

contexto del trabajo social, esta aproximación permite captar la esencia de cómo las comunidades interpretan su situación económica y social. A través de entrevistas en profundidad y grupo focales, los investigadores pueden acceder a narrativas que reflejan no solo las dificultades, sino también las estrategias de resistencia y adaptación que utilizan los grupos vulnerables. Por estas razones, la importancia de la fenomenología en el trabajo social radica en su capacidad para dar voz a quienes históricamente han sido silenciados por las relaciones asimétricas de saber y poder (Foucault, 1980).

Cuadro 2. Arquitectura metodológica de la investigación.



Fuente: elaborado por los autores.

Las fuentes documentales complementaron la mirada fenomenológica al proporcionar un marco teórico y contextual que enriquece la interpretación de los datos cualitativos. Mediante el análisis de documentos relevantes, como políticas públicas, informes y estudios previos, se pudo obtener una visión más amplia sobre las condiciones estructurales que afectan a las comunidades vulnerables. En su conjunto, estos documentos ofrecen información valiosa que ayuda a situar las experiencias individuales dentro de un contexto más amplio, permitiendo identificar patrones y tendencias. En palabras de Arias (2009), el uso de fuentes documentales puede fortalecer la investigación cualitativa al aportar evidencias que respaldan las narrativas recogidas con los instrumentos de recolección de datos.

Por lo demás, la investigación se desarrolló en varias etapas clave que conviene explicar. La primera etapa consiste en la revisión bibliográfica, donde se recopilaron y analizaron fuentes teóricas y doctrinales sobre visiones económicas alternativas y su relación con el trabajo social. Esta revisión permitió establecer un marco conceptual sólido para guiar el desarrollo del estudio. La segunda etapa implicó la recolección de datos cualitativos, que incluirá entrevistas semiestructuradas con miembros de comunidades vulnerables de Ucrania (comunidades afectadas por la guerra) y dos trabajadores sociales expertos en comunidades vulnerables. Esta fase resultó crucial para obtener información directa sobre sus experiencias y percepciones respecto a sus condiciones económicas.

En la tercera etapa, se llevó a cabo un análisis de datos, donde se utilizaron técnicas como el análisis temático para identificar patrones y categorías emergentes en las narrativas recogidas. Esta etapa permitió comprender hermenéuticamente cómo las distintas visiones económicas influyen en el desarrollo sostenible y el bienestar de los grupos más desfavorecidos. Finalmente, se procedió a la elaboración del informe final, donde se presentaron los hallazgos y recomendaciones basadas en la

investigación realizada. Todo indica que, en su conjunto, estas etapas son fundamentales para garantizar la validez y rigor del proceso investigativo.

Tal como sostiene Taylor (1994), el compromiso ético es importante en toda investigación documental, especialmente cuando se trabaja con comunidades vulnerables. Por lo tanto, en un contexto así los investigadores deben asegurarse de que sus prácticas sean respetuosas y beneficien a los grupos involucrados. Esto implica obtener consentimientos informados, garantizar la confidencialidad y utilizar los hallazgos para promover cambios positivos en las comunidades estudiadas. Por todo lo que representa, el compromiso ético no solo es una responsabilidad profesional, sino también una obligación moral hacia aquellos que participan en la investigación, mostrando la forma como viven, sienten y representan su propia realidad, lo que merece respeto.

A modo de análisis y discusión de resultados cualitativos

Las comunidades en Ucrania que han sido más afectadas por la guerra son aquellas ubicadas en las regiones del este del país, como Donetsk y Luhansk, donde los enfrentamientos han dejado profundas huellas en la vida de sus habitantes. La invasión rusa, a gran escala desde febrero de 2022, ha provocado desplazamientos masivos, destrucción de infraestructuras y un deterioro significativo de las condiciones de vida en general, tal como lo indica la BBC News Mundo (2022).

Por lo general, estas comunidades vulneradas por la impronta del ejército invasor enfrentan, por un lado, la pérdida de bienes materiales y, por el otro, la fragmentación social y el trauma psicológico que ocasiona la guerra. Por lo tanto, autores como Piñeros y Rayran-Cortés (2023), tienen razón cuando afirman que, la crisis humanitaria resultante ha llevado a un aumento en la necesidad de la intervención social y apoyo económico, destacando la importancia del trabajo social en la gestión de estas realidades críticas:

La invasión de Rusia sobre Ucrania comenzó el 24 de febrero de 2022 y sigue en curso, lo que genera en distintos niveles y con diferente grado de intensidad afectaciones tanto en Europa como en otras regiones del mundo. Esta crisis no puede estar desarticulada de la primera invasión llevada a cabo por Rusia, en febrero de 2014, sino que están directamente relacionadas y crea, en esta ocasión, una crisis más impredecible y realmente sistémica (Piñeros & Rayran-Cortés, 2023, p. 1).

Pensando en la reconstrucción material y moral de Ucrania posterior al conflicto bélico, un ejemplo real, útil para Europa del este, de cómo la economía solidaria ha mejorado las condiciones de vida de comunidades vulnerables se puede observar en iniciativas en América Latina, donde cooperativas agrícolas han permitido a pequeños productores organizarse y acceder a mercados justos (Razeto, 2010). Estas cooperativas no solo incrementan los ingresos de sus miembros, sino que también fortalecen el tejido social al fomentar la solidaridad y el trabajo conjunto. La obra de Razeto (2015), titulada *Tópicos de economía comprensiva*, destaca sobre estas experiencias cómo la economía solidaria contribuye al empoderamiento económico y social, ofreciendo un modelo replicable para comunidades afectadas por crisis en todas partes del mundo.

Otro ejemplo concreto se encuentra en las iniciativas de economía solidaria en Europa, donde grupos comunitarios han creado redes de apoyo mutuo para enfrentar las consecuencias económicas de la pandemia. Estas redes han facilitado el acceso a recursos, capacitación y oportunidades laborales, mejorando así la calidad de vida de sus miembros (Fonteneau, 2010). La investigación consultada muestra que estas prácticas no solo generan beneficios económicos inmediatos, sino que también promueven una mayor cohesión social y resiliencia comunitaria frente a adversidades de toda índole.

Por su parte, al decir de Mazower (2017), la economía social de mercado ha sido una herramienta clave en el desarrollo económico de Alemania desde la posguerra, nación que, desde su reunificación, se ha convertido en el motor económico de la Unión Europea. Este modelo combina principios del libre mercado con un fuerte componente social, promoviendo políticas redistributivas que buscan equilibrar el crecimiento económico con la justicia social, lo que significa un puente entre el socialismo y las economías de mercado. Desde su implementación después de la Segunda Guerra Mundial, Alemania ha experimentado un notable “milagro económico”, lo que demuestra, según el criterio de Resico (2010), cómo una economía socialmente responsable puede generar prosperidad sostenible

En cualquier caso, este modelo ha permitido a Alemania no solo recuperarse económicamente, sino también establecer un sistema que prioriza el bienestar de sus ciudadanos, lo que es totalmente compatible con los postulados básicos del estado de bienestar, tal como lo entiende Vallès (2000). Al menos a nivel teórico, la combinación de un mercado competitivo con una fuerte red de seguridad social ha sido fundamental para reducir las desigualdades socioeconómicas y fomentar, al mismo tiempo, una inclusión efectiva de los grupos marginados en las dinámicas de desarrollo con enfoque humano (Sen, 2009). La experiencia alemana sugiere que otros países, incluidos los del sur global, pueden beneficiarse al adoptar enfoques similares que integren consideraciones sociales en sus políticas económicas.

En este contexto, al decir de Villasmil (2017), el trabajo social tiene implicaciones económicas y políticas significativas al intentar mejorar la situación existencial de las personas vulneradas en el ejercicio pleno de sus derechos humanos, para lo cual se intentan modificar desde lo local sistemas y estructuras. Por lo tanto, a través del trabajo social, se busca no solo atender necesidades inmediatas, sino también transformar estructuras sociales injustas que perpetúan la desigualdad. Esto implica abogar por políticas públicas inclusivas y promover modelos económicos alternativos que prioricen el bienestar humano sobre el lucro. Así, el trabajo social se convierte en un *agente transformador* capaz de influir en cambios significativos dentro de las comunidades organizadas y los mundos de vida de las personas comunes.

En las entrevistas realizadas con trabajadores sociales expertos¹ en comunidades vulnerables en Ucrania. Ante la pregunta sobre cómo empoderar económica y políticamente a las comunidades afectadas por la guerra, enfatizando la importancia de fomentar su organización comunitaria. El sujeto entrevistado dijo que, es crucial facilitar espacios donde las personas puedan expresar sus necesidades e ideas, así como proporcionar capacitación en habilidades técnicas y gestión empresarial. Además, en un escenario así es importante establecer alianzas con organizaciones no gubernamentales y gobiernos locales para asegurar recursos y apoyo técnico que les permita desarrollar proyectos sostenibles a largo plazo. El modelo de economía solidaria puede ayudar a las comunidades a recuperar su autonomía y fortalecer su capacidad para influir en decisiones políticas relevantes que afectan su futuro.

Como se puede suponer, el esfuerzo de reconstrucción nacional en Ucrania posterior a la guerra demanda una participación de los trabajadores sociales en el impulso sostenido de prácticas de intervención social que busquen mejorar una realidad crítica.

¹ Las personas dos personas entrevistadas solicitaron estar en condición de anonimato, conducta que es común en situaciones de guerra donde las personas temen legítimamente por su seguridad y la de sus familias.

Y es que, definitivamente, la reconstrucción no solo implica reparar infraestructuras físicas, sino también, y esto es precisamente lo más difícil, sanar heridas sociales y psicológicas causadas por el conflicto. Los trabajadores sociales deben estar preparados para implementar programas que aborden tanto las necesidades inmediatas como las causas estructurales del sufrimiento humano. Esta difícil y compleja tarea requerirá de la configuración de un enfoque holístico de intervención social que integre salud mental, desarrollo económico y cohesión social para garantizar un futuro sostenible para las comunidades afectadas por la guerra, en lo más profundo de su dignidad humana.

CONCLUSIONES Y RECOMENDACIONES

Este apartado significa probablemente la sección más destacada de toda la investigación, por dos razones particulares: en la primera, se expone la síntesis de todos los saberes alcanzados y, la segunda razón, tiene que ver con el hecho de que se muestran las opiniones concretas de los autores de la indagación, con toda la carga política e ideológica propia del condicionamiento social del conocimiento y, más aún, del reconocimiento de los propios sesgos y subjetivadas que, para bien o para mal caracterizan a este trabajo. Aclarado lo anterior, se afirma categóricamente que el trabajo social se establece como un puente epistemológico que conecta las visiones económicas alternativas con las realidades particulares de los grupos vulnerables.

El trabajo social es, en esencia y existencia, una disciplina de síntesis epistemológica y metodológica que permite una comprensión profunda de las dinámicas sociales y económicas que afectan las comunidades vulnerables, facilitando la identificación de soluciones adaptadas a sus necesidades específicas. A través de un enfoque crítico y participativo, el trabajo social integra teorías económicas con prácticas comunitarias, promoviendo un diálogo constante entre los conocimientos académicos y las experiencias vividas por los actores sociales. Esta realidad no solo enriquece la práctica profesional, sino que también empodera políticamente a los grupos vulnerables para que sean actores activos en la construcción de su propio desarrollo y en la edificación de sus propios espacios para la convivencia.

Cuando se intenta debatir el sentido y significado de las distintas visiones económicas de la gestión de comunidades vulnerables, desde la perspectiva del trabajo social, resulta fundamental superar los modelos económicos tradicionales, como la economía de mercado y las economías planificadas, en favor de modelos contemporáneos que busquen el logro del desarrollo sostenible. Mucho más cuanto que, estos modelos convencionales a menudo perpetúan desigualdades y no consideran las particularidades de las comunidades vulnerables. En contraste, las visiones económicas alternativas promueven la inclusión social, la equidad y el respeto por el medio ambiente. En consecuencia, la implementación de modelos económicos que prioricen el bienestar humano y la justicia social en escenarios locales, son una herramienta clave para abordar las crisis sociales y ambientales actuales, asegurando en cada momento que todos los miembros de la comunidad tengan acceso a oportunidades y recursos necesarios para el desarrollo de sus capacidades humanas.

En este orden de ideas, la metodología de la intervención social si se usa acertadamente puede elevar la calidad de vida de los grupos vulnerables, ya que permite diseñar estrategias adaptadas a sus contextos específicos. A través de procesos participativos, se fomenta la inclusión y se fortalece la voz de estas comunidades marginadas en la toma de decisiones que afectan sus vidas, lo que expone la trascendencia política y democrática del trabajo social en general. Por lo tanto, la mirada sociocrítica no solo mejora el bienestar material, sino que también refuerza los derechos humanos y la dignidad

de las personas comunes. Por estas poderosas razones, las intervenciones sociales efectivas pueden transformar realidades al empoderar a los individuos y fortalecer sus capacidades para enfrentar adversidades materiales y simbólicas.

Bien entrado el siglo XXI, es necesario reconocer definitivamente que la intervención social no se limita a proporcionar asistencia inmediata, ni es una obra de caridad; de lo que se trata aquí es de construir capacidades humanas e institucionales a largo plazo dentro de las comunidades intervenidas. Esto implica trabajar en el desarrollo de habilidades y destrezas, fomentar el liderazgo local y, al mismo tiempo, promover redes de apoyo comunitario que vitalicen el capital social existente. Si se logra fortalecer estos aspectos, se contribuye a una mayor resiliencia frente a crisis futuras y se generan, por lo tanto, condiciones objetivas y subjetivas propicias para el desarrollo sostenible. Aquí, la intervención social debe ser vista como un proceso continuo que busca transformar estructuras sociales injustas y promover una mayor equidad en el reparto de los bienes de valores², que vayan más allá de la economía.

Para implementar visiones económicas más justas y equitativas en la gestión de comunidades locales, se pueden considerar varias recomendaciones:

A los hacedores de políticas públicas:

- Fomentar políticas inclusivas que integren perspectivas económicas alternativas en el diseño e implementación de programas sociales.
- Establecer mecanismos de participación ciudadana que permitan a las comunidades vulnerables expresar sus necesidades abiertamente y contribuir a la formulación de políticas públicas desde el ejercicio de la contraloría social.

A futuros investigadores en el área:

- Realizar estudios longitudinales que analicen el impacto a largo plazo de diferentes modelos económicos en comunidades vulnerables.
- Promover investigaciones colaborativas que involucren a las comunidades en el proceso investigativo, asegurando que sus voces sean escuchadas y consideradas, lo que garantiza el desarrollo de un conocimiento más completo que rebasa los límites de la simple erudición académica.

Por lo pronto, las principales limitaciones de esta investigación incluyen la dificultad para acceder a datos representativos debido a la heterogeneidad de las comunidades vulnerables. Además, existe el riesgo de sesgos en la interpretación de los datos cualitativos, ya que las experiencias vividas pueden ser subjetivas y variar significativamente entre individuos. La falta de recursos también pudo limitar la capacidad para llevar a cabo un análisis exhaustivo.

² La categoría de bienes de valores se refiere a todos los bienes materiales, morales y culturales que son importantes para la vida de una comunidad determinada. En palabras de Villasmil (2017), el reparto desigual de estos bienes da origen al conflicto social y coloca a ciertos grupos de poder en una situación privilegiada al tiempo que otros, quedan en una situación de vulnerabilidad, de modo que el problema de quienes acceden o no a los bienes de valores es de naturaleza política e ideológica y da forma y contenido a las relaciones de poder, entre los distintos grupos sociales que configuran al orden establecido.

Para cerrar, surgen un conjunto de preguntas filosóficas sobre el tema, que no admiten una respuesta fácil: ¿Cómo podemos definir realmente el concepto de justicia económica en contextos tan diversos? ¿Qué papel deben jugar las comunidades vulnerables en la creación de sus propios modelos económicos? ¿Es posible lograr un equilibrio entre crecimiento económico y equidad social? ¿Cómo pueden las visiones económicas alternativas transformar no solo las condiciones materiales, sino también las relaciones sociales dentro de estas comunidades? Definitivamente, estas preguntas y otras similares invitan a una reflexión profunda sobre el futuro del trabajo social y su impacto en el desarrollo económico sostenible y sirven para visualizar las reformas sociales venideras en el mundo de hoy (Lopushniak, Verkhovod, Oleksenko, & Vonberg, 2024).

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Estrategias de intervención social orientadas al desarrollo de economías sostenibles en zonas turísticas: Un estudio de caso

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Resumen. El objetivo del este estudio consiste en debatir algunas estrategias de intervención social que promueven economías sostenibles, en zonas turísticas de Ucrania, especialmente en el escenario probable de la recuperación integral de la nación tras la guerra. Con este propósito, se instrumentalizó una metodología cualitativa que incluye la recopilación de información significativa a través de entrevistas en profundidad con operadores turísticos y, el análisis de estudios de caso en destinos específicos, así como la evaluación de políticas públicas recientes que impactan el sector turístico. En líneas generales, los resultados potenciales de la investigación implican la identificación de prácticas exitosas en *sostenibilidad turística* y la promoción de la colaboración activa entre actores locales, lo que podría revitalizar la economía regional. Se espera que, en su conjunto, estas estrategias contribuyan, por una parte, a la reconstrucción de la infraestructura turística y, por la otra, fortalezcan la resiliencia económica de las comunidades locales a largo plazo, facilitando un desarrollo más equitativo, justo

y sostenible en el sector turístico ucraniano. Se concluye que las políticas públicas, desarrolladas por trabajadores sociales expertos en intervención social crítica, pueden potenciar, bajo determinadas condiciones, las capacidades productivas del sector turismo, de cara al logro de los objetivos para el desarrollo sostenible.

Palabras clave: estrategias de intervención social; economías sostenibles; sostenibilidad en zonas turísticas; estudio de caso; intervención social crítica.

Social intervention strategies oriented to the development of sustainable economies in tourist areas: A case study

Abstract. The objective of this study is to discuss some social intervention strategies that promote sustainable economies in tourist areas of Ukraine, especially in the likely scenario of the nation's comprehensive post-war recovery. For this purpose, a qualitative methodology was implemented, including the collection of significant information through in-depth interviews with tourism operators and the analysis of case studies in specific destinations, as well as the evaluation of recent public policies impacting the tourism sector. Overall, the potential outcomes of the research involve the identification of successful practices in *tourism sustainability* and the promotion of active collaboration among local stakeholders, which could revitalize the regional economy. Taken together, these strategies are expected to contribute, on the one hand, to the reconstruction of tourism infrastructure and, on the other hand, to strengthen the long-term economic resilience of local communities, facilitating more equitable, fair, and sustainable development in the Ukrainian tourism sector. It is concluded that public policies, developed by social workers with expertise in critical social intervention, can, under certain conditions, enhance the productive capacities of the tourism sector to achieve sustainable development goals.

Keywords: social intervention strategies; sustainable economies; sustainability in tourist areas; case study; critical social intervention.

INTRODUCCIÓN

Tal como se infiere de los planteamientos de ONU Turismo (2016), la implementación de estrategias de intervención social orientadas al desarrollo de economías sostenibles, en zonas turísticas, significa la puesta en marcha de un enfoque estratégico para fomentar el crecimiento socioeconómico y la resiliencia en comunidades vulnerables. Estas estrategias se centran en la colaboración entre diversos actores, incluyendo gobiernos, organizaciones no gubernamentales y comunidades locales, entre otros, para diseñar e implementar, en cada caso, proyectos de intervención o acompañamiento que promuevan el bienestar social y económico. En el contexto específico de Ucrania, donde el turismo puede ser un motor clave para la recuperación postconflicto, estas intervenciones buscan no solo revitalizar la economía local, sino también, y esto es lo fundamental, fortalecer el tejido social y cultural de las regiones afectadas por la guerra. La Organización Mundial del Turismo (OMT) ha enfatizado la importancia de este modelo resiliente en su apoyo al desarrollo turístico en Ucrania,

promoviendo la capacitación y la creación de redes intersubjetivas entre las partes interesadas en esta actividad económica (ONU Turismo, 2016).

En este orden de ideas, las estrategias de intervención social tienen una utilidad práctica significativa, ya que permiten abordar las necesidades específicas de las comunidades locales mientras se fomenta un turismo responsable. A través de estas intervenciones, se pueden establecer programas que habiliten a los residentes en capacidades humanas relacionadas con el turismo (Nussbaum, 2012), promoviendo así su participación en la economía local. Además, estas estrategias pueden facilitar la creación de políticas inclusivas que garanticen que los beneficios del turismo se distribuyan equitativamente entre los miembros de la comunidad, con especial énfasis en los grupos vulnerables. Y es que, definitivamente, el desarrollo del turismo sostenible no solo mejora las condiciones económicas, sino que también contribuye a la preservación del patrimonio cultural y natural, lo cual es esencial para atraer a turistas conscientes y responsables.

De conformidad con lo establecido en la llamada Agenda 2030 (Asamblea General de Naciones Unidas, 2018), los objetivos que se pueden lograr mediante la implementación de estas estrategias son variados, e incluyen la generación de empleo local, el fortalecimiento de la infraestructura comunitaria y la promoción de prácticas sostenibles. Cuando se involucra sin obstáculos burocráticos a las comunidades en el proceso de toma de decisiones, se asegura que sus voces sean escuchadas y sus necesidades sean atendidas. Esto fomenta un sentido de pertenencia y orgullo entre los residentes y, al mismo tiempo, crea un entorno más atractivo para los turistas que buscan experiencias auténticas y significativas. Tal como sostiene el Foro Económico Mundial (2023), la capacidad del turismo para contribuir al desarrollo sostenible es especialmente relevante en el siglo XXI, donde hay una creciente demanda por parte de los consumidores por prácticas empresariales responsables.

Tal como se verá a lo largo de este artículo, el turismo puede ser una herramienta poderosa para el desarrollo sostenible al ofrecer oportunidades de tipo económicas a personas, familias y comunidades enteras. En este contexto, el sector turístico puede generar ingresos significativos que se reinvierten en proyectos comunitarios, educación y salud. De modo que, al fomentar un modelo de intervención social crítica¹, centrado en la comunidad, se promueve una experiencia económica que prioriza el bienestar social sobre las ganancias a corto plazo. Esto es especialmente importante en regiones como Ucrania, donde las comunidades han enfrentado desafíos significativos debido a conflictos y crisis económicas recurrentes.

Al calor de la evidencia empírica disponible, los autores de esta investigación piensan que, la implementación de estrategias de intervención social orientadas al desarrollo de economías sostenibles, en zonas turísticas representa una iniciativa colectiva importante para transformar el panorama económico y social de Ucrania. Estas iniciativas ayudan a reconstruir comunidades afectadas por crisis y establecen, en cada momento, un modelo turístico más inclusivo y responsable.

¹Al decir de Villasmil: “La noción de intervención social admite variadas lecturas y significados desde la óptica de la ciencia social crítica que desea transitar de la intervención social convencional, a la intervención sociopolítica (intervención social-crítica), que intenta renovar la arquitectura del orden sociopolítico imperante desde la acción focalizada en grupos, casos y comunidades, que no solo dan cuenta de las problemáticas de vida de personas y grupos particulares, sino de estos como ‘víctimas’ representativas de las contradicciones de un sistema violento y excluyente que debe ser revisado y renovado desde sus cimientos ontológicos y epistemológicos” (2017, pp. 34-35).

Al integrar las necesidades locales con las tendencias globales hacia un turismo sostenible, Ucrania puede posicionarse como un destino atractivo para viajeros conscientes que buscan contribuir positivamente a las comunidades que visitan, desde el respeto a sus particulares realidades.

En este orden de ideas, consiste en debatir algunas estrategias de intervención social que promueven economías sostenibles, en zonas turísticas de Ucrania, especialmente en el escenario probable de la recuperación integral de la nación tras la guerra. El texto está dividido en 4 secciones o partes: en la primera, se exponen los materiales documentales recabados sobre el tema y se identifican las influencias teóricas más relevantes; en la segunda sección, se describen los procedimientos metodológicos implementados en la investigación; en la tercera, se analizan y discuten los principales resultados obtenidos por la acción hermenéutica de las fuentes documentales y de los testimonios proporcionados por las personas entrevistadas. Por último, se presentan las principales conclusiones y recomendaciones que emergen del caso de estudio, junto al índice de referencias bibliográficas en orden alfabético.

MATERIALES DOCUMENTALES SOBRE EL TEMA E INFLUENCIAS TEÓRICAS MÁS RELEVANTES

En esta sección, se hace una revisión *grosso modo* de las principales teorías que explican cualitativamente la intervención social y, se conectan con las categorías de desarrollo sostenible en el sector turismo. Con todo esto se intenta justificar en términos epistemológicos la relación existente entre políticas públicas, intervención social, desarrollo sostenible y turismo en Ucrania, desde la lectura hermenéutica de fuentes documentales de comprobado valor académico, ya que fueron seleccionadas únicamente de revistas científicas de alto impacto internacional, editoriales académicas de prestigiosas universidades o de sitios web especializados en turismo.

En principio, podemos definir a la intervención social como un espacio material y simbólicos en el que afloran, bajo determinadas condiciones de liderazgo y participación ciudadana, una intención social para la transformación continua de la realidad. Por su parte, la intención social, entendida como el deseo de los individuos de contribuir al bienestar de su comunidad, ha sido objeto de estudio en diversas teorías sociales. Entre ellas, la teoría del capital social destaca, según Ritzer (1993) por su enfoque basado en las redes de relaciones intersubjetivas que permiten a las comunidades movilizar recursos y alcanzar objetivos comunes. En palabras de Barros (2021), en el contexto del turismo sostenible, esta teoría sugiere que el fortalecimiento de la cohesión social puede facilitar la implementación de prácticas turísticas que beneficien tanto a los visitantes como a los residentes locales. Si se logra fomentar la colaboración y el compromiso comunitario, se puede promover un desarrollo turístico que respete y preserve los recursos culturales y naturales de las comunidades, alineándose con los principios del desarrollo sostenible.

En este marco temático, otra teoría relevante es la teoría del cambio social, que se centra en cómo las intervenciones sociales pueden generar transformaciones significativas en las estructuras constitutivas de una comunidad determinada en su tiempo y espacio geográfico. Tal como sostiene Fontana (1999), en un marco histórico político más amplio, esta teoría es particularmente pertinente para el desarrollo sostenible en el turismo, ya que permite identificar cómo las políticas públicas pueden influir en el comportamiento de las comunidades y en la gestión de recursos. Por ejemplo, al implementar programas de capacitación en turismo sostenible, se puede empoderar a las comunidades locales para que gestionen sus propios recursos y participen activamente en la economía

turística. Esta dinámica de acción, participación y cambio no solo mejora su calidad de vida, sino que también asegura que el turismo contribuya positivamente al desarrollo económico y social

Desde una relectura múltiple de Vallès (2000), la relación ontológica entre políticas públicas, intervención social y desarrollo sostenible es importante para el sector turístico en Ucrania. Las políticas públicas pueden facilitar la creación de marcos normativos que promuevan prácticas sostenibles y apoyen a las comunidades locales en su desarrollo turístico. Del mismo modo, estas políticas deben ser diseñadas con un enfoque participativo, asegurando que las voces de las comunidades sean escuchadas y consideradas en el proceso de toma de decisiones. Para una democracia participativa, donde el protagonismo recae en las comunidades organizadas, es esencial para crear un turismo inclusivo que beneficie a todos los actores involucrados y, al mismo tiempo, fomente un sentido de pertenencia entre los residentes de la localidad turística, tal como refiere ONU Turismo (2016).

Aunado a lo anterior, el turismo sostenible puede servir como un motor para la recuperación económica y social en Ucrania tras el conflicto reciente. En este contexto, a través de la promoción del turismo responsable y comunitario, se pueden generar ingresos vitales para las comunidades locales, creando empleo y, paulatinamente, la infraestructura necesaria para atender a los turistas. Este enfoque, que combina en igualdad de condiciones, la sostenibilidad, con la resiliencia y la participación comunitaria, ayuda a restaurar la economía local y, simultáneamente, contribuye a la preservación del patrimonio cultural y natural del país. Y es que, tal como afirma Porras (2023), las iniciativas turísticas que involucran a las comunidades pueden ofrecer experiencias auténticas a los visitantes mientras se garantizan beneficios.

Todas las fuentes consultadas por los autores de esta investigación ponen en evidencia que la interconexión dialéctica entre teorías sociales sobre la intención comunitaria y el desarrollo sostenible en el sector turístico es importante para abordar los desafíos actuales en Ucrania. En consecuencia, al integrar enfoques teóricos con prácticas efectivas de intervención social y políticas públicas inclusivas, se puede fomentar un turismo que no solo sea económicamente viable, sino también socialmente justo y ambientalmente responsable (Asamblea General de Naciones Unidas, 2018; ONU Turismo, 2016). Esta práctica permitirá a Ucrania aprovechar su potencial turístico como una herramienta clave para la reconstrucción y el desarrollo sostenible a largo plazo, a pesar del drama generado por la guerra.

METODOLOGÍA DE LA INVESTIGACIÓN

En consonancia con los parámetros epistemológicos de Martínez (2009), la metodología cualitativa propuesta para esta investigación se basa en la hermenéutica dialéctica de fuentes documentales y entrevistas en profundidad. El enfoque hermenéutico permitió interpretar y describir las cadenas de significado de documentos relevantes sobre estrategias de intervención social y desarrollo sostenible en el turismo ucraniano. Asimismo, se realiza en la investigación una revisión exhaustiva de políticas públicas, informes gubernamentales y estudios académicos para contextualizar el tema. Este análisis documental proporciona una base sólida para comprender el marco teórico y práctico de las intervenciones sociales en el sector turístico de Ucrania.

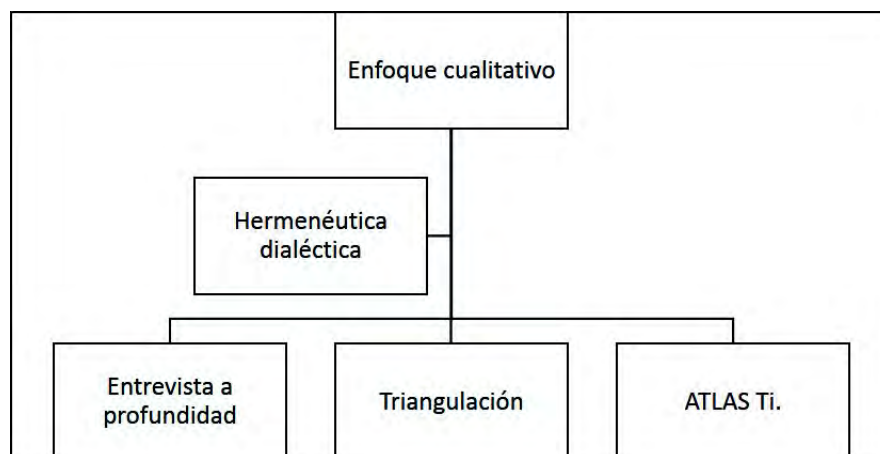
Las entrevistas en profundidad se llevarán a cabo con una muestra equilibrada de 10 personas (5 hombres y 5 mujeres) dedicadas al turismo sostenible en Ucrania. Estos participantes o sujetos de estudio fueron seleccionados mediante un muestreo intencional, buscando diversidad en términos

de experiencia, roles en el sector, turismo y ubicación geográfica dentro del país. Definitivamente, las entrevistas semiestructuradas permitieron explorar las percepciones, experiencias, subjetividades y desafíos enfrentados por los actores clave en la implementación de estrategias de intervención social, para el desarrollo de economías sostenibles en zonas turísticas.

En completa sintonía con el objetivo de la investigación, este es, debatir algunas estrategias de intervención social que promueven economías sostenibles, en zonas turísticas de Ucrania, especialmente en el escenario probable de la recuperación integral de la nación tras la guerra, el cuestionario para las entrevistas se guió de las siguientes 5 preguntas abiertas:

- 1) ¿Cómo describiría las principales estrategias de intervención social implementadas en su área para promover el turismo sostenible?
- 2) ¿Qué impacto han tenido estas estrategias en el desarrollo económico local y en la sostenibilidad de la comunidad?
- 3) ¿Cuáles son los principales desafíos que ha enfrentado en la implementación de prácticas de turismo sostenible?
- 4) ¿Cómo se involucra a la comunidad local en el diseño y ejecución de estas estrategias de intervención social?
- 5) ¿Qué recomendaciones haría para mejorar la efectividad de las intervenciones sociales en el desarrollo de economías sostenibles en zonas turísticas?

Cuadro 1. Plano de la arquitectura metodológica de la investigación.



Fuente: Elaborado por los autores (2024).

Conviene recordar que, en términos cualitativos, el análisis de los datos se realizó mediante un enfoque interpretativo, buscando en cada momento la identificación de temas emergentes y patrones recurrentes en las respuestas de los entrevistados. Por lo demás, se empleó un software de análisis cualitativo (Atlas Ti) para codificar y categorizar la información obtenida. Finalmente, la triangulación de los datos de las entrevistas con el análisis documental permitió a los autores de esta investigación una comprensión más profunda y holística del fenómeno estudiado. Este enfoque metodológico facilitó la identificación de estrategias efectivas y áreas de mejora en las intervenciones sociales orientadas al desarrollo de economías sostenibles, en las zonas turísticas de Ucrania.

A MODO DE ANÁLISIS Y DISCUSIÓN DE RESULTADOS (CUALITATIVOS)

Hay suficiente evidencia empírica y documental que muestran, más allá de toda duda razonable que, las estrategias de intervención social orientadas al desarrollo de economías sostenibles en zonas turísticas se constituyen en experiencias colectivas útiles, cuando se busca revitalizar comunidades, especialmente en contextos como el de Ucrania, signados por la guerra. Un ejemplo notable, que bien vale la pena mencionar es el proyecto de turismo sostenible en la región de los Cárpatos, según reseña Mariana Oleskiv quien fuera presidenta de la Agencia Estatal para el desarrollo del turismo en Ucrania (Tourism and Society Think Tank, 2023), donde se han implementado iniciativas que promueven la conservación del medio ambiente y la cultura local.

Estas estrategias incluyen específicamente la capacitación de guías locales, la promoción de productos artesanales y la creación de rutas turísticas que resaltan la biodiversidad y el patrimonio cultural. El hermoso equilibrio entre un rico patrimonio histórico y biodiversidad, por un lado, atrae a turistas interesados en experiencias auténticas y, por otro, fortalece el tejido social y económico de las comunidades involucradas, como se ha documentado en varias investigaciones sobre turismo sostenible en el país (Foro Económico Mundial, 2023). Más específicamente Oleskiv piensa que:

Estoy seguro de que después de la victoria de Ucrania, el papel global de Ucrania se transformará en una acción - para visitar Ucrania, para descubrir su poder y belleza, para conocer a la gente increíblemente valiente, para sentir el espíritu de heroísmo y dolor, para conocer nuestra cultura, para probar la cocina local. Para aprender a pronunciar “Slava Ukrayini” y “¡Heroyam Slava!” (Tourism and Society Think Tank, 2023, par. 3).

Desde la perspectiva de un agente de turismo ucraniano entrevistado por los autores de esta investigación (2, 2024), quien prefirió estar en el anonimato para resguardar su seguridad ante la impronta del ejército invasor, describió: “...que las principales estrategias de intervención social implementadas en nuestra área como un esfuerzo conjunto entre el gobierno local y las organizaciones no gubernamentales, han sido relativamente exitosas” (2, 2024, p. 02). Estas estrategias incluyen talleres de sensibilización sobre la importancia del turismo sostenible, así como programas de capacitación para los residentes sobre cómo ofrecer servicios turísticos que respeten el medio ambiente. Además, se han establecido asociaciones con empresas locales para promover productos y servicios que beneficien a la comunidad. Más allá de ciertos problemas, esta colaboración desarrollada en cerca de Jarkov ha permitido crear un modelo turístico más inclusivo y responsable, alineado con las necesidades y aspiraciones locales.

Sea como sea, el impacto de estas estrategias en el desarrollo económico local ha sido significativo. De hecho, hemos observado un aumento en la generación de ingresos a través del turismo, lo que ha permitido a muchas familias mejorar su calidad de vida, tal como confirma el Foro Económico Mundial (2023). Igualmente, estas iniciativas han contribuido a la sostenibilidad ambiental, al fomentar prácticas responsables entre los turistas y los operadores turísticos. En general, la comunidad se beneficia no solo económicamente, sino también culturalmente, ya que hay un mayor reconocimiento y valorización de nuestras tradiciones y costumbres. Sin embargo, es crucial seguir monitoreando de forma cualitativa y cuantitativa estos impactos para garantizar que se mantengan a largo plazo.

Pero a pesar de los avances, enfrentamos en Ucrania varios desafíos en la implementación de prácticas de turismo sostenible. Uno de los principales obstáculos es la falta de financiamiento adecuado para desarrollar infraestructuras necesarias, como caminos y servicios básicos que faciliten

Imagen 1. Situación de la Guerra en Ucrania en 2022.



Fuente: (Europa Press, 2022).

el acceso a las zonas turísticas (2, 2024). También hay resistencia al cambio por parte de algunos miembros de la comunidad que están acostumbrados a prácticas turísticas más convencionales. Todos estos desafíos requieren, tal como afirman Klopov *et al.*, (2023), un esfuerzo adicional en comunicación y educación para mostrar los beneficios del turismo sostenible y cómo puede integrarse con nuestras tradiciones. Incluso esta labor educativa, la inteligencia artificial IA tiene muchos recursos, instrucciones para ofrecer, mucho más cuanto:

The digital development of the modern world requires the formation of a cognitive model of education based on artificial intelligence and the development of approaches to the analysis of smart education, which is its basis. The cognitive model of education based on artificial intelligence emphasises the importance of deep learning, a deep understanding of educational digital concepts, and the formation of values and culture necessary to address the challenges of modern development (Klopov *et al.*, 2023, p. 2625).

Por todas las razones aludidas en el texto, los autores afirman categóricamente que, la participación comunitaria es necesaria en el diseño y ejecución de estas estrategias de turismo y desarrollo sostenible. En este contexto, la política de intervención social turista demanda, por lo general, de reuniones regulares donde se invita a los residentes a expresar abiertamente sus opiniones y sugerencias sobre las iniciativas turísticas. Esta práctica de acción comunicativa racional y simétrica, no solo asegura que las intervenciones sean relevantes y efectivas, sino que también fomenta un sentido de pertenencia entre los miembros de la comunidad (Habermas, 1999). Si a pesar de las dificultades se logra involucrar a los residentes en cada etapa del proceso deliberativo, se crea un modelo turístico que refleja verdaderamente sus valores y necesidades.

Simplificando las cosas con fines analíticos, las estrategias de intervención social orientadas al desarrollo de economías sostenibles en zonas turísticas son cruciales para revitalizar comunidades afectadas por la guerra en Ucrania. A través del ejemplo del turismo sostenible en los Cárpatos, se evidencia cómo estas iniciativas pueden generar impactos positivos tanto económicos como socio-culturales. Sin embargo, es fundamental abordar al mismo tiempo los desafíos existentes mediante una mayor inversión en infraestructura y educación comunitaria (Nikitenko, *et al.*, 2024). Sin lugar a duda, la participación de los residentes en el proceso es clave para asegurar el éxito a largo plazo de estas estrategias, convirtiendo el turismo en una herramienta poderosa para el desarrollo sostenible en Ucrania.

EL CASO DE ESTUDIO: PROYECTO TURÍSTICO DE DESARROLLO SOSTENIBLE EN LOS CÁRPATOS-UCRANIA

En el presente apartado se muestran los aspectos más destacados de las entrevistas en profundidad desarrolladas con la colaboración de 10 personas (5 hombres y 5 mujeres) dedicadas al turismo sostenible en Ucrania. Conviene destacar que todos los entrevistados conocían los objetivos y propósitos finales de esta investigación y que, están de acuerdo con la información que aquí se proporciona.

Ante la pregunta 1, el sujeto de estudio (2, 2024) responde que, como operador turístico en la región de los Cárpatos, puedo decir que nuestras principales estrategias de intervención social se centran en la preservación de nuestra cultura y entorno natural. En consecuencia, hemos implementado programas de capacitación para guías locales, enfocándonos en la interpretación del patrimonio natural y cultural. También hemos desarrollado iniciativas para promover la artesanía local y la gastronomía tradicional, creando mercados y festivales que atraen a turistas interesados en experiencias auténticas. Además, hemos establecido alianzas con comunidades locales para desarrollar alojamientos ecológicos que respetan el entorno y las tradiciones locales.

En cuanto a la segunda pregunta (pregunta 2) el Sujeto de Estudio 5 (2024), refiere abiertamente que: “El impacto de estas estrategias ha sido significativo en nuestra comunidad. Hemos visto un aumento en los ingresos locales, con más familias beneficiándose directamente del turismo” (5, 2024, p. 2). La creación de empleos relacionados con el turismo sostenible ha ayudado a reducir la migración de jóvenes a las ciudades. En cuanto a la sostenibilidad, nuestras prácticas han contribuido a la conservación de áreas naturales y a la revitalización de tradiciones culturales que estaban en riesgo de perderse. También hemos notado un mayor orgullo y sentido de pertenencia entre los residentes locales.

En cuanto a la tercera pregunta, El sujeto de estudio 2 (2024), sostiene que los principales desafíos que han enfrentado incluyen la resistencia inicial de algunos miembros de la comunidad que temían que el turismo alterara su forma de vida. También agrega que han luchado con la falta de infraestructura adecuada, especialmente en las áreas más remotas. La estacionalidad del turismo ha sido otro desafío, ya que los operadores turísticos locales buscan mantener un flujo constante de visitantes sin sobrecargar sus recursos naturales. Por lo demás, la reciente situación de conflicto en Ucrania ha generado preocupaciones de seguridad entre algunos turistas potenciales.

La cuarta pregunta la respondió directamente los miembros del equipo de investigación, desde el conocimiento directo de la realidad turística de Ucrania. Y es que, pudimos observar que, en este

caso de desarrollo sostenible, se involucró a la comunidad local a través de reuniones regulares y talleres participativos donde los residentes pudieron expresar sus ideas y preocupaciones, abiertamente y sin tapujos. En este contexto geográfico, se han creado comités locales de turismo que participan activamente en la toma de decisiones sobre nuevos proyectos. También, se ha fomentado la participación de jóvenes y mujeres en diferentes iniciativas, ofreciendo programas de mentoría y microcréditos para emprendimientos turísticos locales. Aunado a todo lo anterior, la educación ambiental en escuelas locales es otra forma en la que se involucra a la comunidad desde temprana edad en la industria turística sostenible (Porras, 2023).

En cuanto a la última pregunta el sujeto de estudio 5 agrego enfáticamente que:

Mis recomendaciones para mejorar la efectividad de las intervenciones sociales incluirían aumentar la colaboración con instituciones educativas para desarrollar programas de formación más especializados en turismo sostenible. También sugeriría crear una red regional de destinos de turismo sostenible para compartir mejores prácticas y recursos. Es muy importante mejorar la infraestructura digital para facilitar la promoción y reserva de experiencias turísticas sostenibles. Además, recomendaría desarrollar métricas más precisas para medir el impacto social y ambiental del turismo, lo que nos permitiría ajustar nuestras estrategias de manera más efectiva (5, 2024, p. 5).

En síntesis, tal como se puede observar en esta sección el enfoque en el turismo sostenible en los Cárpatos se basa en la preservación cultural y ambiental, la participación comunitaria y el desarrollo económico local. A pesar de los desafíos como la resistencia inicial, la falta de infraestructura y las preocupaciones de seguridad, antes de la invasión rusa del febrero de 2022, se había logrado impactos positivos en términos de ingresos locales, conservación y orgullo comunitario, lo que en su conjunto fortalecía la identidad local. Todo este éxito se debe en gran parte a la participación de la comunidad en la toma de decisiones y la implementación de proyectos realistas. Para seguir mejorando, es vital enfocarse en la educación especializada, la colaboración regional, la infraestructura digital y la medición precisa del impacto de los diferentes proyectos turísticos desarrollados para atraer visitantes y mejorar las condiciones de vida de las comunidades involucradas en el proceso.

CONCLUSIONES, RECOMENDACIONES Y LIMITACIONES DEL ARTÍCULO

Las siguientes consideraciones finales no tienen ninguna pretensión de erudición académica o de construcción de una teoría general sobre el tema, simplemente muestran las opiniones consensuadas de los autores de este artículo y presentan grosso modo un panorama de síntesis de las experiencias y saberes descritas a lo largo del texto, desde una perspectiva filosófica que intenta rebasar los postulados neoliberales contrarias al humanismo solidario (Oleksenko, Molodychenko, & Shcherbakova, 2018).

En este orden de ideas, el desarrollo sostenible y el turismo en Ucrania presentan una oportunidad única para la reconstrucción nacional, especialmente en comunidades afectadas por la guerra. A través de la intervención social crítica, es decir, la forma de intervención que busca transformar las estructuras de una realidad social determinada se puede identificar y abordar las necesidades específicas de estas comunidades, promoviendo un espacio inclusivo que respete sus realidades y aspiraciones particulares. Por lo tanto, el turismo puede ser un motor de recuperación económica, generando empleos y fomentando la inversión en infraestructura local, lo que contribuye a la revitalización de áreas devastadas.

No exagerado afirmar que, en líneas generales, el turismo tiene el potencial de ayudar a la reconstrucción nacional al atraer visitantes interesados en experiencias auténticas que reflejen la cultura y la historia reciente de Ucrania, como una nación soberana que lucha por su soberanía y su libertad ante el imperialismo ruso de tipo postsoviético. Esta actividad no solo genera ingresos, sino que también promueve un sentido de orgullo y resiliencia entre los residentes locales. Conjuntamente, al involucrar a las comunidades en el desarrollo turístico, se asegura que los beneficios económicos se distribuyan equitativamente, fortaleciendo el tejido social y fomentando la cohesión comunitaria, de cara al logro de los objetivos del desarrollo sostenible (Organización de Naciones Unidas, 2022).

En todas las iniciativas que combinan intervención social y desarrollo sostenible resulta crucial que los hacedores de políticas públicas en el área de turismo implementen estrategias que prioricen la sostenibilidad y la inclusión de personas y comunidades vulnerables o vulneradas en el ejercicio de sus derechos fundamentales. En consecuencia, se deben desarrollar políticas, planes y proyectos que faciliten la capacitación de los residentes locales en prácticas turísticas responsables y sostenibles en el tiempo. Asimismo, se debe establecer un marco regulatorio que proteja los recursos naturales y culturales de cada destino, garantizando que el desarrollo turístico no comprometa el patrimonio local, tangible o intangible. De modo que, las inversiones en infraestructura básica también son necesarias para mejorar el acceso a las zonas turísticas, sin degradar a la cultura material.

Por todas las razones esgrimidas, para los actores sociales inmersos en el turismo, resulta estratégico fomentar alianzas entre comunidades, empresas y gobiernos locales, en relación de suma positiva, donde todos pueden ganar. Estas colaboraciones pueden facilitar el intercambio de conocimientos y recursos, creando un ecosistema turístico más robusto y resiliente, de cara a la recuperación integral de la nación tras la guerra. Las futuras investigaciones deberían centrarse en evaluar el impacto a largo plazo del turismo sostenible en comunidades postconflicto y, al mismo tiempo, explorar modelos exitosos de intervención social que puedan ser replicados en otras regiones afectadas por la crisis bélica.

Finalmente, desde una perspectiva ética, es vital abordar las complejidades del estudio del turismo en comunidades afectadas por la guerra. En este contexto teórico y metodológico, se debe garantizar en todo momento que las investigaciones respeten la dignidad y los derechos humanos de los residentes locales, evitando cualquier forma de explotación o sobre exposición de sus historias tras la guerra. Las principales limitaciones de esta investigación incluyen el acceso restringido a ciertas áreas debido a la inestabilidad nacional y la falta de datos (cualitativos y cuantitativos) actualizados sobre las condiciones socioeconómicas postconflicto. A pesar de estos desafíos, el potencial del turismo como herramienta para la reconstrucción sostenible es significativo y debe ser explorado e investigado científicamente con sensibilidad y compromiso ético.

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Cultura organizacional y bienestar profesional: El papel mediador de la congruencia de valores

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Resumen. La congruencia de los valores de la organización y los valores personales de los empleados se considera una condición para preservar su bienestar profesional. El propósito de este estudio es probar empíricamente el papel mediador de la congruencia de valores en la relación entre el tipo percibido de cultura organizacional y el bienestar ocupacional. Se aplicó un método transversal utilizando el Instrumento de Evaluación de Cultura Organizacional (OCAI) de Cameron y Quinn, el Cuestionario de Satisfacción de Necesidades de Porter (NSQ), la Escala de Satisfacción Laboral de Spector (JSS), la Escala de Congruencia de Valores Percibidos del Cuestionario de Congruencia de Valores Personales y Organizacionales para empleados (Q-POVC-115) Vveinhardt & Gulbovaité. Los participantes de la encuesta fueron 92 profesores de escuelas superiores. Los resultados indican que la influencia del tipo percibido de cultura organizacional en el bienestar profesional se lleva a cabo a través de la mediación de la congruencia de valores, que, a su vez, está relacionada con la satisfacción de las necesidades de los empleados. Un entorno congruente con los valores en la organización crea una atmósfera de seguridad psicológica, mejora la interacción, promueve la realización del potencial personal de los empleados y, por lo tanto, contribuye a su bienestar profesional. El efecto mediador revelado por nosotros en la relación

entre las variables estudiadas y el bienestar profesional amplía las ideas existentes sobre el papel de la cultura organizacional en la formación del bienestar profesional de los empleados y abre nuevas perspectivas para la prevención efectiva de sus violaciones.

Palabras clave: cultura organizacional, congruencia de valores, bienestar profesional, bienestar subjetivo, análisis de mediación.

Organizational culture and professional well-being: The mediating role of value congruence

Abstract. The congruence of the organization's values and the personal values of the employees is considered a condition for preserving their professional well-being. The purpose of this study is to empirically test the mediating role of value congruence in the relationship between the perceived type of organizational culture and occupational well-being. A cross-sectional method was applied using Cameron and Quinn's Organizational Culture Assessment Instrument (OCAI), Porter's Needs Satisfaction Questionnaire (SCN), Spector's Job Satisfaction Scale (JSS), and the Perceived Values Congruence Scale of the Vveinhardt & Gulbovaitė Personal and Organizational Values Congruence Questionnaire for employees (Q-POVC-115). The survey participants were 92 high school teachers. The results indicate that the influence of the perceived type of organizational culture on professional well-being is carried out through the mediation of value congruence, which, in turn, is related to the satisfaction of employee needs. An environment congruent with the values in the organization creates an atmosphere of psychological safety, improves interaction, promotes the realization of employees' personal potential, and thus contributes to their professional well-being. The mediating effect revealed by us in the relationship between the variables studied and professional well-being expands the existing ideas about the role of organizational culture in the formation of employees' professional well-being and opens new perspectives for the effective prevention of their violations.

Key words: organizational culture, congruence of values, professional well-being of the individual, subjective well-being, mediation analysis.

INTRODUCTION

General background information

In the context of the study of organizational and psychological determinants of the professional well-being of an individual, organizational culture is of interest as a potentially influential factor due to its ability to influence all aspects of the organization's activities and the work behavior of employees. Organizational culture influences the high organizational support and the high positive psychological capital (Vasconcelos, Oliveira, & El-Aouar, 2022). It is known that each organization has its own unique organizational culture, which produces values, prescribes and controls the norms of employee interaction, which creates a general psychological climate and unites individual members of the organization into a single organism (Macena, & Bastos, 2020; Petrunko, 2022).

Theorists and practitioners recognize the benefits of engaging employees with organizational values that are congruent with organizational values: it ensures goal-directed and desired behavior of organizational members and contributes to organizational success, positive employee attitudes toward work, and positive organizational climate (Klajkó et al., 2019). The congruence of personal and organizational values means that the organizational values supported by the organization's top management are acceptable to most members of that organization (Vveinhardt, & Gulbovaite, 2018). If the official and unofficial systems of norms and values do not coincide, but contradict each other, this increases the level of emotional tension in the organization. According to the motivational value model of professional well-being (Voitenko et al., 2024), which presents it as an integrated state that is formed in connection with the extent to which individual needs are realized in professional activity, considering individual values and meanings, this fact has a logical explanation. The discrepancy between the organization's values and the employees' personal values prevents the satisfaction of their basic needs, including the need for belonging and autonomy (Ryan, & Deci, 2017), and therefore becomes an obstacle on the way to professional well-being. Employees may feel pressure by working according to goals and values they do not approve of in a so-called "dissonant context" (Rosenberg, 1979), and risk to get less social support, which may affect their sense of belonging. The experience of autonomy also partly depends on the extent to which a person's actions correspond to his own interests and values. Being in the context of dissonant values, the need to act against one's own goals and values reduces the sense of autonomy and, accordingly, becomes an obstacle on the way to professional well-being. Therefore, the congruence of values in organizations is gaining more and more practical importance and determines the need for more well-planned studies of the nature of its relationship with organizational culture and the professional well-being of employees.

Specific background information

Organizational culture and professional well-being

Organizational culture is a relevant area in the context of the study of occupational well-being, as it plays a crucial role in shaping employee behavior. A stable organizational culture is based on a well-defined system of values (Schein, 1975), which determines the style of work of employees, communication and the degree of openness within the organization, their ability to realize their potential and many other everyday organizational practices on which the well-being of employees depends. Organizational culture is viewed as a shared system of beliefs, values, and ways of thinking established by leaders and accepted by all members of an organization (Meng, & Berger, 2019). Organizational values provide a common perception of the organizational climate through the selection and screening of group members, as well as the influence of similar objective characteristics that reinforce similar perceptions. An organization's employees develop a set of mutually acceptable ideas and beliefs about what is important and how to respond, and this increases their engagement and job satisfaction (Meng, & Berger, 2019). Evidence from the literature supports that organizations can enrich their culture with positive elements to create more opportunities to support various aspects of the occupational well-being of their employees. As organizational culture clarifies and establishes the standards of behavior of employees, it improves interaction, communication and mutual respect among them (Lubis and Hanum, 2020) and is considered as a condition for cooperation and performance of organizational members (Shao et al., 2012). Organizational culture can significantly influence perceived stress levels, employee turnover, and organizational identification (Klajkó et al., 2019). However, the relationship between these indicators appears to be mediated

precisely by mutual acceptability, consistency of mutual interests and beliefs, which is emphasized by many researchers as an important condition for the positive functioning of both the organization as a whole and its individual members. It is known, for example, that if the organizational culture meets the requirements of employees, they feel more comfortable and protected in their organization (Bicer, 2022). The concept of cultural fit, formulated in several early studies, assumed that work productivity is a function of the fit between the needs of employees and the culture of the organization, and was recognized as an effective means of increasing employee motivation, job satisfaction, and work engagement. Employees who experience a cultural “misfit” when their needs do not match the needs met by the job are more likely to feel frustrated. For example, unmet needs have been found to be the cause of employee turnover within two to five years (Winter, 1973). Conversely, it has been confirmed that the fit between the type of culture and the needs of employees contributes to job satisfaction and involvement in work processes (Koberg, & Chusmir, 1987). Organizational climates sensitize well-being to a greater extent and women may be able to absorb better the benefits of a friendly and contributory work environment (Macena, & Bastos, 2020). Therefore, the conformity of the organizational environment, first, to the needs of employees, is important for their well-being, health, satisfaction and quality of work.

The impact of value congruence on professional well-being

According to the motivational value model of occupational well-being (Voitenko et al., 2024), meeting needs alone is not enough to achieve occupational well-being. It has been established that the employee evaluates the degree of his well-being based on internal criteria - values that determine the importance of various aspects of professional life and have different effects on the experience of professional well-being. Research in recent decades increasingly examines the congruence of employee and organizational values in the context of its impact on the professional environment and attempts to prove the usefulness of this impact for both employees and organizations. Perceived value congruence refers to a person’s perception of the degree of correspondence, compatibility and similarity of his values with the values of interacting objects (organizations, managers, work groups) (Rahn et al., 2023). It has been established that the perceived congruence of values can positively affect the effectiveness of organizational activities, particularly, reduce resistance to organizational changes on the part of employees, influence the acceptance of these changes (Rahn et al., 2023), helps to stimulate employees’ readiness for organizational changes (Deng et al., 2023), reduces staff turnover (Aldabbas, 2022). One can note an active research interest in the interaction of value congruence with various organizational aspects that directly affect the internal state of employees. It has been found that value congruence can positively influence employee job satisfaction, and conversely, perceived value incongruence is associated with poor well-being and increased risk of burnout (Dunning, et al., 2021). Previous research has shown that value congruence mediates and moderates the relationship between organizational leadership characteristics, particularly leader narcissism and employee defensive behavior (Erkutlu et al., 2020). Congruence of values is considered a key factor in achieving fit between the person and the organization, which reduces stress (Swetha Palla Sai, Padmavathy, 2023). The presence of an employee who matches his organization, team and leader, in turn, acts as a factor of satisfaction on the part of the group leader (Çiçek, & Biçer, 2015): value congruence has a full mediating effect on the relationship between demographic similarity with the leader and his satisfaction, as well as the partial mediating effect between job similarity and leader satisfaction.

Harmonization of individual values and values prevailing in the organization is considered a way to achieve employee cohesion in the organization (Vveinhardt et al., 2016). It has been shown that the congruence of personal and organizational values is related to well-being and perceived achievements at work (Veage et al., 2014). We also have evidence that value congruence influences organizational commitment through the mediation of job happiness (Oyelakin et al., 2021).

Description of the gap in our knowledge that the study was designed to fill

The conducted review revealed a paradox that, on the one hand, confirms that the organizational culture in general and, particularly, the congruence of the values of the organization and employees has a tangible impact on various aspects of the positive functioning of employees, but on the other hand, it is difficult to find studies that would be purposeful studied its relationship with professional well-being. Our research will fill this gap. Studying the mediating role of the congruence of the organization's values and the personal values of employees in the relationship between organizational culture and professional well-being will allow us to form a clearer picture of the nature of the relationships between these variables and open new ways of supporting professional well-being. Based on the conducted analysis, it is possible to assume that the congruence of values mediates the influence of organizational culture on the professional well-being of employees and is related to their needs, and to build a research program based on the following hypotheses:

H1: The perceived type of organizational culture is related to the professional well-being of employees.

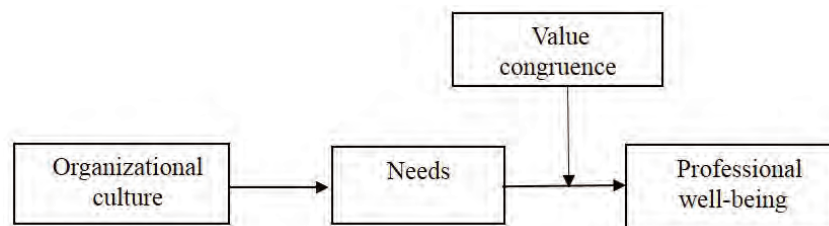
H2: Professional well-being of employees is positively correlated with value congruence.

H3: Value congruence is related to employee occupational well-being through the satisfaction of employee needs.

H4: Congruence of values mediates the influence of organizational culture on the professional well-being of employees.

Figure 1 reflects the theoretical basis of the study, according to which the influence of organizational culture on professional well-being is carried out through the mediation of value congruence and the satisfaction of psychological needs of employees.

Figure 1. The mediating effect of value congruence in the relationship between organizational culture and professional well-being.



The study objective

The purpose of this study is to empirically test the mediating role of values congruence in the relationship between the perceived type of organizational culture and the professional well-being of employees.

The article contains the following structural components: the methodological part, which describes the applied methods and diagnostic tools; the next part presents the obtained results, discussion of the results and conclusions.

METHODOLOGY

This study is a continuation of the scientific search for organizational and psychological determinants of professional well-being of an individual, which determined the use of the same methods and, in part, diagnostic tools, described in our previous publication (Voitenko et al., 2024). The purpose of the study was implemented using a cross-sectional method using Porter's Need Satisfaction Questionnaire (NSQ), Spector's Job Satisfaction Scale (JSS), Cameron and Quinn's Organizational Culture Assessment Instrument (OCAI), Perceived Congruence of Values Questionnaire of the Congruence of Personal and Organizational Values for an Employee (Q-POVC-115) Vveinhardt & Gulbovaite. The study of mediation effects was carried out according to the mediation analysis procedure described by Baron, & Kenny (1986) with preliminary diagnosis of all components. The original scales were translated from English to Ukrainian using the reverse translation method.

To assess the level of satisfaction of employees' needs, the Needs Satisfaction Questionnaire (NSQ) by L. Porter (1961) modified by Roy Payne (Payne, 1970) was used. The questionnaire consists of eight items with a seven-point scale from 1 (minimum) to seven points (maximum). The scale contains three dimensions: the perceived lack of satisfaction of needs (discrepancy score), the indicator of the importance of various aspects of professional activity for the employee (importance score) and the general index of satisfaction of needs (need satisfaction index).

We used Spector's Job Satisfaction Survey (JSS) to assess professional well-being (Spector, 2022). The scale determines the employee's attitude to his work according to 9 parameters, and allows to obtain an estimate of overall satisfaction with his position in the organization. Each aspect is assessed on four items, and a total score is calculated for all items. Respondents are offered six answer options for each item ranging from "strongly disagree" to "strongly agree".

Organizational culture was measured with the Organizational Culture Assessment Instrument (OCAI) (Cameron and Quinn, 2011). The questionnaire is designed to determine the current type of culture in the organization, and helps to determine the desired culture, which, according to the members of the organization, should be developed to meet the future demands of the environment and opportunities that the company will face. The questionnaire consists of 24 items related to six key aspects of organizational culture: dominant characteristics, organizational leadership, employee management, organizational "glue", strategic emphasis, success criteria. For each aspect, the four statements reflect four types or profiles of organizational culture: clan, adhocracy, market, and hierarchy. Respondents rated each statement on a scale of 1 to 4, creating a rating in which 1 point was assigned to the statement that they believed best represented their organization.

The Scale of Perceived Congruence of Values from the Questionnaire of Congruence of Personal and Organizational Values for Employees (Q-POVC-115) (Vveinhardt, Gulbovaite, 2018) was used to measure the degrees of perceived correspondence between the values of employees and their organizations. The ultra-short scale contains five items related to the correspondence between the employee's personal values and the values of the organization in which he works, each of which is evaluated on a five-point scale from 1 "completely disagree" to 5 "completely agree".

The participants of this study were 92 academic employees of universities, selected by the method of random selection. The most important socio-demographic characteristics of the respondents are presented in Table 1.

TABLE 1. Socio-demographic characteristics of the sample

Age	N	%	Gender	N	%	Position	N	%
25-35	14	15,2	Male	36	39	Head of Department	22	24
36-45	36	39,1				Lecturer	8	8,7
46-55	26	28,3	Female	56	61	Senior Lecturer	8	8,7
> 56	16	17,4				Associate Professor	42	45,7
Total	92	100		92	100	Professor	12	23,9
							92	100

As can be seen from the data in the table, all age categories and academic positions of the respondents are represented in the study, which confirms the representativeness of the studied sample.

For statistical data processing, correlation analysis and multiple linear regression (MLR) were applied using the enter method without including constants in the equation. The strength and directionality of the relationship between variables was assessed by the parametric linear correlation coefficient of Pearson. Descriptive statistics (mean, standard deviation, skewness, kurtosis) were calculated to characterize the observations. The initial data of the variables were checked for compliance with the law of normal distribution. Calculations were performed in SPSS Statistics 23.0.

RESULTS

The presence of statistically significant correlations between the perceived type of organizational culture and the professional well-being of employees was revealed, except for the market culture ($p > .05$), which will be excluded from further analysis, as well as moderate correlations between the perceived type of organizational culture and congruence of values (Table 2).

TABLE 2. The Summary of Descriptive Statistics & Correlations between types of organizational culture, professional well-being and value congruence (N = 92)

Variables	M	SD	S	K	Professional well-being	Value congruence
Clan culture	2,40	,93	,089	-1,18	-,413**	-,351**
Adhocracy culture	2,78	,62	,101	-,842	-,291**	-,226*
Market culture	2,59	,66	-,072	-,928	,100	,117
Culture of hierarchy	2,22	,72	,358	-,839	,274**	-,050
Professional well-being	137,2	20,09	-,546	-,548	1	,612**
Value congruence	15,6	1,6	,007	,410	,612**	1

Note: M - average value; SD – standard deviation; S – skewness; K – kurtosis.

** – correlation statistically significant at the 0.001 level (2-sided).

* – correlation statistically significant at the 0.05 level (2-sided).

The relationship between indicators of need satisfaction, value congruence and professional well-being

To test the hypothesis that the relationship between value congruence and professional well-being functions through the mediation of indicators of satisfaction of individual needs, an analysis of three regression equations was performed (Baron, & Kenny, 1986): first, regression of the mediator (indicators of need satisfaction) on of the independent variable (congruence of values), secondly, regression of the dependent variable (professional well-being) on the independent variable (congruence of values), thirdly, regression of the dependent variable (professional well-being) both on the independent variable (congruence of values) and on the mediator (indicators of satisfaction of needs). Linear regression was applied using the Enter method without including constants in the equation. Significance tests were performed using F-tests, t-tests, adjusted R².

Regression of the mediator (indicators of satisfaction of needs) on the independent variable (congruence of values)

In the first step, the regression of the mediator on the independent variable was estimated (Table 3). The ANOVA test confirmed the reliability of the constructed regression models; therefore, these models can be meaningfully interpreted. Regression analysis confirmed a statistically significant effect of value congruence (VC) on all indicators of need satisfaction according to Porter's Need Satisfaction Questionnaire (NSQ) (1961): Need Satisfaction Index (NSI) ($F=94.612$; $df=1$; $p<0.001$; $R^2=.510$), the general indicator of the discrepancy between the desired and the actual state of needs satisfaction (DS) ($F=86.243$; $df=1$; $p<0.001$; $R^2=.487$), the general indicator of the importance of the specified aspects of work (IS) ($F=1004.540$; $df=1$; $p<0.001$; $R^2=.917$).

Regression of the dependent variable (professional well-being) on the independent variable (congruence of values)

In the second step, the regression of the dependent variable on the independent variable was estimated (Table 3). A statistically significant effect of value congruence (VC) on overall satisfaction with various aspects of professional activity (PWB) was confirmed ($F=6860.831$; $df=1$; $p<0.001$; $R^2=.987$).

Regression of the dependent variable (professional well-being) both on the independent variable (congruence of values) and on the mediator (needs)

In the third step, to confirm the influence of the mediator on the dependent variable while controlling for the independent variable, in addition to the need satisfaction indicators, the value congruence indicator was included for the prediction of professional well-being in the regression analysis (Table 3). The model of the joint influence of the predictor and mediator on the dependent variable is statistically significant ($F=1759.580$; $df=4$; $p<0.001$; $R^2=.988$), but, as can be seen from the table, the joint influence of value congruence (VC) and indicators of satisfaction of needs on professional well-being is not confirmed ($p>.05$).

TABLE 3. The mediating role of need satisfaction in the relationship between value congruence and professional well-being*

Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.	
		B	Std. Error	Beta			
1	Need Satisfaction Index (NSI)	VC	,010	,001	,714	9,727	,000
	Discrepancy Score (DS)	VC	,063	,007	,698	9,287	,000
	Importance Score (IS)	VC	,365	,012	,958	31,694	,000
2	Professional Wellbeing (PWB)	VC	8,755	,106	,993	82,830	,000
3	Professional Wellbeing (PWB)	VC	8,763	,397	,994	22,100	,000
		DS	-,163	13,567	-,002	-,012	,990
		IS	,730	1,151	,032	,634	,528
		NSI	-26,390	87,532	-,042	-,301	,764

* *Linear Regression through the Origin.*

The model of the third analysis shows that the regression coefficients that demonstrate the contribution of need satisfaction indicators to the variability of professional well-being are statistically insignificant ($p > 0.05$), so they can be excluded from the model (table 3). The relative contribution of value congruence to the prediction of professional well-being in this model is 99% ($\beta = .994$), which indicates the practical absence of mediators between these variables.

Correlation analysis of the data confirmed a few linear relationships between the congruence of values and the needs of employees (Table 4).

TABLE 4. The Summary of Descriptive Statistics & Correlations between indicators of need satisfaction and congruence of values (N=92)

Variables	Need for safety	Social needs	Need for respect	Need for autonomy	The need for self-realization	Need Satisfaction Index (NSI)	Discrepancy Score (DS)	Importance Score (IS)
Congruence of values	,27*	,18	,20	,07	,28*	-,50**	-,46**	-,05
Need Satisfaction Index (NSI)	-,26*	-,25*	-,25*	-,04	-,28*	1	,99**	,35**
Discrepancy Score (DS)	-,25*	-,22*	-,21*	-,03	-,22*	,99**	1	,39**
Importance Score (IS)	,56**	,68**	,71**	,79**	,75**	,35**	,39**	1
Statistics								
Mean	4,4	9,4	9,6	5,1	9,5	,16	1,0	5,8
Std. Deviation	1,9	3,4	3,3	1,6	3,5	,15	,97	1,6
Skewness	-,40	-,50	-,72	-1,1	-,73	1,2	1,4	-2,0
Kurtosis	-1,0	-,56	-,31	-,57	-,48	1,7	2,7	2,9

** – correlation statistically significant at the 0.001 level (2-sided)

* – correlation statistically significant at the 0.05 level (2-sided).

The mediating effect of value congruence in the relationship between the perceived type of organizational culture and professional well-being.

To test the assumption that the relationship between the perceived type of organizational culture and professional well-being functions through the mediation of value congruence, three regression equations were analyzed: first, the regression of the mediator (value congruence) on the independent variable (organizational culture), second, the regression of the dependent variable (professional well-being) on the independent variable (organizational culture), third, the regression of the dependent variable (professional well-being) on both the independent variable (organizational culture) and the mediator (value congruence). Linear regression was applied using the Enter method without including constants in the equation. Significance tests were performed using F-tests, t-tests, adjusted R2.

Regression of the mediator (congruence of values) on the independent variable (organizational culture)

At the first stage, the regression of the mediator on the independent variable was estimated (table 5). Regression analysis confirmed a statistically significant influence of the perceived type of organizational culture on value congruence: clan culture (CC) ($F=475.259$; $p<0.001$; $R^2=.839$), culture of adhocracy (CA) ($F=1278.737$; $df=1$; $p<0.001$; $R^2=.934$), hierarchy culture (CH) ($F=772.006$; $df=1$; $p<0.001$; $R^2=.895$).

TABLE 5. Regression of the mediator (congruence of values) on the independent variable (organizational culture)*

Models	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
1 Clan Culture (CC) VC	,150	,007	,916	21,800	,000
2 Culture of Adhocracy (CA) VC	,175	,005	,966	35,759	,000
3 Culture of Hierarchy (CH) VC	,140	,005	,946	27,785	,000

*Linear Regression through the Origin.

Regression of the dependent variable (professional well-being) on the independent variable (organizational culture)

At the second stage, the regression of the dependent variable on the independent variable was estimated (table 6). A statistically significant influence of the perceived type of organizational culture on the professional well-being of employees was confirmed: clan culture (CC) ($F=397.896$; $df=1$; $p<0.001$; $R^2=.814$), culture of adhocracy (CA) ($F=980.999$; $df=1$; $p<0.001$; $R^2=.915$), hierarchy culture (CH) ($F=925.028$; $df=1$; $p<0.001$; $R^2=.910$).

TABLE 6. Regression of the dependent variable (professional well-being) on the independent variable (organizational culture)*

Models			Unstandardized Coefficients		Standardized Coefficients	t	Sig.
			B	Std. Error	Beta		
1	Clan Culture (CC)	PWB	48,659	2,439	,902	19,947	,000
2	Culture of Adhocracy (CA)	PWB	46,631	1,489	,957	31,321	,000
3	Culture of Hierarchy (CH)	PWB	56,605	1,861	,954	30,414	,000

**Linear Regression through the Origin.*

Regression of the dependent variable (professional well-being) on both the independent variable (organizational culture) and the mediator (value congruence)

At the third stage, to confirm the influence of the mediator on the dependent variable while controlling the independent variable, in addition to value congruence, the perceived type of organizational culture is included in the regression models to predict the professional well-being of employees (Table 7). The ANOVA test confirmed the reliability of the constructed regression models; therefore, these models can be meaningfully interpreted. The joint influence of value congruence (VC) and clan culture (CC) ($R^2=.987$; $F=3499.749$; $df=2$; $p<0.001$), value congruence (VC) and culture of adhocracy (CA) ($R^2=.987$; $F=3435.027$; $df=2$; $p<0.001$), values congruence (VC) and hierarchy culture ($R^2=.989$; $df=2$; $p<0.001$).

TABLE 7. Regression of the dependent variable (professional well-being) on both the independent variable (organizational culture) and the mediator (value congruence)*

Model			Unstandardized Coefficients		Standardized Coefficients	t	Sig.
			B	Std. Error	Beta		
1	Professional well-being	Clan Culture (CC)	-2,675	1,598	-,050	-1,674	,098
		Value Congruence (VC)	9,155	,261	1,039	35,066	,000
2	Professional well-being	Culture of Adhocracy (CA)	-2,386	2,267	-,049	-1,052	,295
		Value Congruence (VC)	9,171	,410	1,041	22,379	,000
3	Professional well-being	Culture of hierarchy (CH)	8,197	2,027	,138	4,044	,000
		Value Congruence (VC)	7,603	,301	,863	25,253	,000

**Linear Regression through the Origin.*

DISCUSSION

The purpose of the study was to determine the nature of the relationship between organizational culture, value congruence, needs and professional well-being of employees, and, particularly, to empirically test the mediating role of value congruence in the relationship between the perceived type of organizational culture and professional well-being. Correlation analysis revealed the presence of statistically significant moderate correlations between indicators of clan culture ($r=-.413$; $p<.001$),

adhocracy culture ($r=-.291$; $p<.001$) and hierarchy culture ($r=.274$; $p<.001$) and professional well-being of employees. Market culture does not have a linear relationship with professional well-being ($r=.100$; $p>.05$). Our findings of negative correlations of clan culture and adhocracy culture with employee well-being are inconsistent with previous research that found that clan culture exhibits the strongest positive correlation with job satisfaction, followed by adhocracy, hierarchy, and market cultures (Aldhuwaihi, Shee and Stanton, 2012; Olynick, & Li, 2020). Employees working in clan cultures reported the lowest levels of stress, followed by adhocracy, hierarchy, and market cultures (Klajkó et al., 2019; Olynick, & Li, 2020). At first glance, these are logical and expected connections: clan culture is characterized by teamwork, consensus and participation, emphasizes human resource development, facilitation and mentoring by the leader (Basar et al., 2022), which together determine the success of such an organization. The culture of adhocracy is focused on entrepreneurship, innovation, creativity, and risk-taking, with personal development as the highest priority (Sherman et al., 2014). Our revealed results become more understandable considering the obtained negative correlations between clan cultures ($r=-.351$; $p<.001$) and adhocracy ($r=-.226$; $p<.05$) with the level of congruence of values of employees and organizations in which they work and are obviously related to the specifics of the studied sample and its value priorities. In contrast to previous studies, the participants of which were employed in various sectors of work at the university, including maintenance, library services, health care, etc. (Olynick, & Li, 2020), our study sample was homogenous and represented purely by academic staff. A high school teacher is an ambitious individual motivated to achieve, first, individual success, so teamwork and coordination in a clan culture can be a cause of dissatisfaction due to a lack of autonomy. Under the conditions of the adhocracy culture, the organization is a very dynamic and entrepreneurial environment that requires readiness for risk and new challenges. All this obviously contradicts the desire of employees for order, stability, freedom from stress, that is, the desire for psychological safety, which is an important aspect of the well-being of employees (Voitenko et al., 2023). In this sense, the positive correlation of hierarchy culture with occupational well-being is logical given its ability to provide stability, predictability and security for employees (Basar et al., 2022). The market culture, focused on increasing the productivity of the organization, results and getting ahead of competitors, is characterized by high demands on employees and, accordingly, high stressogenicity (Klajkó et al., 2019), therefore it does not correlate with the professional well-being of employees focused on stability and safety. Thus, the results generally support our hypothesis, which predicted differences in the relationship between perceived types of organizational culture and employee occupational well-being.

Correlation analysis confirmed the hypothesis of a positive relationship between the congruence of the values of employees and the organization and professional well-being ($r=.612$; $p<.001$). This result is in good agreement with the data of previous studies, which also confirmed the impact of the congruence of the values on various aspects of professional well-being, in particular, its positive impact on employee job satisfaction (Dunning et al., 2021); impact on well-being and perceived achievement at work (Veage et al., 2014).

The results of the analysis of the mediating effect of indicators of satisfaction of needs on the relationship between the congruence of values and the professional well-being of employees are shown in Table 3. Mediator analysis shows that the relationship between value congruence and professional well-being does not function through the mediation of indicators of satisfaction of individual needs. The results showed that the regression coefficients, which demonstrate the contribution of need satisfaction indicators to the variability of professional well-being, lost statistical significance ($p>.05$)

after entering them into the study as a mediator, so they can be excluded from the model. The relative contribution of value congruence to the prediction of professional well-being in this model is 99% ($\beta=.994$), which indicates the practical absence of mediators between these variables.

Correlation analysis of the data confirmed a few linear relationships between the congruence of values and the needs of employees (Table 4). The current state of satisfaction of needs according to L. Porter's scale reflects the resources of the organization that meet the needs of employees. As can be seen from Table 4, a high level of value congruence is associated with a high sense of security ($r=.273$; $p<0.05$). This is a logical and expected relationship based on the definition of value congruence (Vveinhardt, & Gulbovaite, 2018). If official and unofficial value systems contradict each other, this increases the level of conflict and emotional tension in the organization and, accordingly, threatens the psychological safety of employees. Congruence of values correlates with social needs and the need for respect at the level of a statistical trend ($p<0.1$), which raises some doubts about accepting the hypothesis that there is no connection between these variables. Employees risk less social support when working in a so-called "dissonant context" (Rosenberg, 1979), which may affect their desire for belonging. The theoretically expected correlation of value congruence with the need for autonomy was not established ($p>0.05$). Congruence of values positively correlates with the existing state of satisfaction of the need for self-realization at the level of statistical significance ($r=.276$; $p<0.05$), which is explained by the fact that an employee who effectively satisfies the need for self-realization is characterized by acceptance of himself and the surrounding environment, a feeling involvement and unity with others (Maslow, 1970). Congruence of values correlates with the indicator of the discrepancy between the desired and actual state of needs satisfaction (DS) ($r=-.459$; $p<.001$) and the needs satisfaction index (NSI) at a high level of statistical significance ($r=-.496$; $p<.001$). The importance indicator, which in the applied modification of the scale is an auxiliary indicator designed to determine the Need Satisfaction Index, does not correlate with the congruence of values ($p>0.05$). The obtained results show that a high level of value congruence correlates with a low level of discrepancy between the desired and actual states of satisfaction of the needs of employees. The relationship with the generalized needs satisfaction index (NSI) has a negative modality due to the specificity of its calculation. The need satisfaction index (NSI) is obtained by dividing the total discrepancy score (DS) by the total importance rating for the employee of the selected aspects of the job (IS). NSI can range from "0" to "1", with need satisfaction being higher as the index approaches "0". Therefore, an increase in value congruence is associated with an increase in the level of satisfaction of employees' needs.

The results of the mediation analysis of value congruence in the relationship between the perceived type of organizational culture and professional well-being confirmed the assumption that value congruence mediates the influence of organizational culture on the professional well-being of employees. Full mediation by the congruence of values of the impact of clan culture ($\beta=1.039$) and adhocracy culture ($\beta=1.041$) on professional well-being was statistically confirmed. Regression coefficients that demonstrate the contribution of indicators of clan culture and adhocracy culture to the variability of professional well-being lost statistical significance ($p>0.05$) after inclusion in the study of congruence of values as a mediator, which indicates the existence of a single dominant mediator (Baron, & Kenny, 1986). This result is in good agreement with the results of previous studies, which also confirmed the mediating role of values in the achievement of occupational well-being by employees (Voitenko et al., 2024). The obtained results revealed a partial mediation by the congruence of values of the influence of hierarchy culture on the pro-

professional well-being of employees. As can be seen from the data in Table 6, the joint influence of values congruence and hierarchy culture on professional well-being is statistically confirmed. The results showed that the relationship between hierarchy culture and occupational well-being remained statistically significant when value congruence measures were entered into the study as a mediator. The share of the variation in professional well-being is explained by the variation in the level of psychological safety and indicators of satisfaction of needs for almost 99% ($R^2=.989$) and only 1% is explained by other factors. A comparison of the regression coefficients shows that the effect of hierarchy culture on occupational well-being was significantly reduced in the third equation ($\beta=.138$) than in the second ($\beta=.954$), after value congruence measures were added as a mediator. A significant reduction in the effect of the independent variable on the dependent variable indicates that the mediator is indeed powerful (Baron, & Kenny, 1986). Therefore, it can be concluded that the connection between organizational culture and professional well-being functions through the mediation of value congruence, which in turn is related to the satisfaction of the employee's needs. Each employee experiences professional well-being in the context of personal values and needs, the possibility of realizing which in professional activity depends on consistency with organizational values.

CONCLUSIONS

The conducted research showed that the way employees perceive their work environment and, particularly, the organizational culture, is important for their professional well-being. The obtained results made it possible to confirm the existence of a connection between the perceived type of organizational culture and the professional well-being of employees. It was established that the directionality of this connection depends on the specific characteristics of the organizational culture. Indicators of clan culture and culture of adhocracy have moderate negative correlations with professional well-being, indicators of hierarchy culture have a positive relationship with professional well-being. Market culture does not have a linear relationship with professional well-being. Considering the obtained negative correlations between clan and adhocracy cultures with the level of congruence of values of employees and the organizations in which they work, it can be concluded that the relationship between organizational culture and professional well-being is related to the value priorities of the studied sample, in particular congruence of the organization's values with the personal values of employees.

It has been confirmed that the congruence of the values of the organization and employees is an important determinant of their professional well-being due to its connection with needs. Congruence of values has a linear relationship with the existing state of satisfaction of the needs of employees, in particular, the need for safety and self-realization, as well as with social needs and the need for respect at the level of a statistical trend. Congruence of values correlates with generalized indicators of employee satisfaction at a high level of statistical significance. Mediator analysis confirmed that value congruence is the dominant mediator between the perceived type of organizational culture and the professional well-being of employees. Value congruence has a full mediating effect on the relationship between clan culture and occupational well-being and adhocracy culture and occupational well-being, and a partial mediating effect between hierarchy culture and occupational well-being. Therefore, the influence of organizational culture on the professional well-being of employees is mediated by the consistency of their values with the values of the organization, which, in

turn, is related to the satisfaction of employees' needs. A value-congruent environment creates an atmosphere of psychological safety, improves interaction, promotes the realization of the personal potential of employees, and therefore contributes to their professional well-being.

The mediating effect revealed by us in the relationship between the studied variables and professional well-being expands the existing ideas about the role of organizational culture in the formation of the professional well-being of employees and opens new perspectives for the effective prevention of its violations. The search for practical ways to achieve congruence of values in the organization should be the direction of further research.

The limitation of this study concerns, firstly, the somewhat limited number of the studied sample. Secondly, the survey was conducted in several universities. The participants were asked to voluntarily take part in the survey, but the verification of voluntary participation, as well as the complete exclusion of administrative influence, appears to be impossible. These conditions may have somewhat influenced the generalized results.

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La importancia social de la formación continua de los funcionarios públicos para maximizar la gobernanza y la gobernabilidad democrática. Percepciones y debates

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Resumen. La gobernabilidad y la gobernanza democrática son categorías analíticas cruciales para el estudio de los sistemas políticos contemporáneos en el siglo XXI. La gobernabilidad se refiere a la estabilidad de la democracia y su capacidad para integrar las demandas y aspiraciones de la sociedad. Por otro lado, la gobernanza se centra en la legitimidad de un buen gobierno. En este contexto de debate político y social, el objetivo principal de este artículo científico es describir la importancia social de la formación continua de los funcionarios públicos para maximizar la gobernanza y la gobernabilidad democrática en el siglo XXI. Metodológicamente, se empleó la técnica de investigación documental y la mayéutica socrática, donde la formulación de preguntas inteligentes es clave para alcanzar la verdad de los entes. Se concluye que, en una era marcada por la creciente relevancia de la tecnología y la transparencia, los ciudadanos demandan legítimamente un gobierno que responda a sus necesidades y expectativas. Por lo tanto, la formación continua se convierte en un requisito indispensable para que los funcionarios se adapten a las nuevas realidades y demandas sociales, que son complejas y dinámicas.

Palabras clave: gobernabilidad, gobernanza democrática, formación continua, mayéutica socrática, tecnología y transparencia.

The social importance of continuous training of public officials to maximize governance and democratic governance. Perceptions and debates

Abstract. Governance and democratic governance are crucial analytical categories for the study of contemporary political systems in the twenty-first century. Governance refers to the stability of democracy and its ability to integrate the demands and aspirations of society. On the other hand, governance focuses on the legitimacy of good governance. In this context of political and social debate, the main objective of this scientific article is to describe the social importance of the continuous training of public officials to maximize governance and democratic governance in the twenty-first century. Methodologically, the technique of documentary research and Socratic maieutics were used, where the formulation of intelligent questions is key to reaching the truth of the entities. It concludes that, in an era marked by the growing relevance of technology and transparency, citizens legitimately demand a government that responds to their needs and expectations. Therefore, continuous training becomes an essential requirement for civil servants to adapt to new realities and social demands, which are complex and dynamic.

Keywords: governance, democratic governance, continuous training, Socratic maieutics, technology and transparency.

INTRODUCCIÓN

En términos epistemológicos, la gobernanza se refiere a las formas en que se gestionan los asuntos públicos, abarcando tanto el proceso de toma de decisiones como la implementación de políticas públicas en general (Vallès, 2000). Desde el punto de vista político, implica la interacción entre el Estado y la sociedad civil, donde se busca un equilibrio entre el poder y la responsabilidad. Por su parte, jurídicamente, la gobernanza se fundamenta en el respeto a las leyes y normas que rigen la conducta de los actores involucrados y remite a la garantía del Estado de derecho. Ideológicamente, al decir de Aguilar Villanueva (2020), se relaciona dialécticamente con la legitimidad del poder, donde la gobernabilidad democrática se manifiesta a través de instituciones que garantizan la participación ciudadana y el respeto a los derechos humanos. En este sentido, ambos conceptos son interdependientes; ya que en la realidad histórica concreta una gobernanza efectiva es crucial para mantener una gobernabilidad democrática estable.

En este hilo conductor, la formación continua de los empleados públicos es la clave para asegurar que estos cuenten con las habilidades y conocimientos necesarios para desempeñar sus funciones de manera eficiente. Según documentos oficiales del Gobierno de España (2017), esta formación mejora la calidad del servicio público y, al mismo tiempo, tiene un impacto social positivo al fomentar un entorno donde las comunidades reciben atención adecuada y oportuna a sus necesidades. De modo que, cuando los funcionarios están bien capacitados, se legitima el funcionamiento de los órganos del Estado, lo que genera confianza en las instituciones y promueve una mayor participación ciudadana. En consecuencia, es válida la hipótesis según la cual: la formación continua contribuye a fortalecer la relación entre el Estado y la sociedad, facilitando un mejor cumplimiento de las demandas sociales.

En el marco del debate gobernanza y gobernabilidad democrática, el objetivo general de este artículo científico es describir la importancia social de la formación continua de los funcionarios públicos para maximizar la gobernanza y la gobernabilidad democrática en el siglo XXI. Para abordar este tema, surgen varias preguntas filosóficas, tales como: ¿Cómo puede la formación continua transformar la percepción pública sobre el gobierno? ¿Qué papel juegan los valores éticos en el desarrollo profesional de los funcionarios? ¿De qué manera influye la capacitación en la legitimidad del Estado? Y ¿Es posible valorar (cualitativa y cuantitativamente) el impacto social de una mejor formación de los funcionarios públicos en términos de confianza ciudadana?

La justificación científica y social para investigar este tema radica en su relevancia teórica y práctica para el desarrollo sostenible de las democracias contemporáneas. Y es que, definitivamente la formación continua del talento humano no solo mejora las competencias individuales de los funcionarios, sino que también, y esto es lo fundamental fortalece las instituciones democráticas al promover una cultura de aprendizaje y adaptación ante cambios sociales y políticos (Aguilar Villanueva, 2020). Por lo demás, al abordar las necesidades cambiantes de la sociedad, se pueden prevenir crisis institucionales y fomentar un clima de confianza entre ciudadanos y autoridades. Esta mirada integral es clave cuando se trata de garantizar que los gobiernos democráticos en el siglo XXI, sean capaces de responder efectivamente a los desafíos contemporáneos.

En este orden de ideas, las posibles líneas de investigación que surgen del desarrollo del tema y de sus múltiples fenómenos constitutivos, incluyen:

- El análisis comparativo entre países con diferentes niveles de inversión en formación continua para funcionarios públicos.
- Estudio sobre cómo la capacitación impacta en la percepción pública sobre la eficacia gubernamental.
- Investigación sobre programas específicos de formación continua y su relación con indicadores de gobernabilidad.
- Evaluación del papel de las nuevas tecnologías en el proceso formativo de empleados públicos.

En lo concreto, el presente artículo se divide en 5 secciones particulares pero conectadas al objetivo general de la investigación. En la primera sección, se hace una breve revisión de las fuentes documentales que sirvieron de base teórica para entender en el fenómeno de estudio en el actual contexto internacional; en la segunda, se describen las bases metodológicas del texto. En la tercera sección, se analizan y discuten los principales hallazgos obtenidos, sin ninguna pretensión de deductiva de generalizar resultados. Por último, se exponen las conclusiones y recomendaciones del caso y se presenta el índice de referencias citadas en orden alfabético, con arreglo al estilo APA.

Revisión bibliográfica y hemerográfica

La revisión literaria sobre este tema revela a la comprensión hermenéutica una serie de estudios relevantes que abordan, desde distintas metodologías y puntos de vista, cómo la formación continua de los empleados públicos influye en la gobernanza democrática con un impacto social positivo. Es este sentido, un artículo clave es “Gobernabilidad democrática” por Guzmán (2003), que establece que un sistema político efectivo debe permitir que las normas sean producto de una participación activa de la ciudadana organiza y nunca el resultado del uso arbitrario del poder del Estado.

Este trabajo destaca además cómo una formación adecuada puede facilitar esta participación de las personas comunes, con énfasis especial en las mujeres, en la dirección política de la sociedad (Guzmán, 2003).

Otro estudio significativo por sus aportes cognitivos es “La gobernabilidad democrática como respuesta efectiva y perdurable a los desafíos de América Latina” (2021), donde se argumenta que un gobierno legítimo debe ser capaz de responder a las demandas sociales mediante políticas públicas efectivas. En este contexto, la capacitación continua es vista como un medio para lograr esta capacidad institucional que es la base de toda democracia sustantiva (Instituto Internacional para la Democracia y la Asistencia Electoral, 2021). Por lo demás, el texto afirma que en el Sur Global:

La población está ávida de oportunidades de trabajo digno y de servicios de salud, educación y transporte, entre otras necesidades básicas no satisfechas, exacerbadas por la crisis. La democracia es el régimen más propicio para ofrecer respuestas eficientes y perdurables a estos desafíos, pero no es precisamente expedita para encontrar soluciones inmediatas, de ahí la tentación de implementar arreglos rápidos que, en última instancia, no resuelven las causas profundas de los problemas. (Instituto Internacional para la Democracia y la Asistencia Electoral, 2021, p. 8).

Otra obra destacada de idea que conviene analizar y debatir es: “Gobernanza, democracia y desarrollo en América Latina y el Caribe (2022), la enfatiza con arreglo a la evidencia empírica que tanto la gobernanza como el ejercicio del poder deben estar alineados con las necesidades sociales. Aquí, la formación continua del talento humano es la base material para que los funcionarios comprendan estas necesidades y actúen en consecuencia (IDEA, 2022).

En *¿Cómo lograr el desarrollo de empleados públicos?* de Euroinnova (2024), se aborda cómo la capacitación no solo promueve habilidades técnicas sino también competencias blandas necesarias para interactuar con ciudadanos. Este enfoque integral resulta básico para mejorar el servicio público, mucho más cuanto que:

En el ámbito de la administración pública, el desarrollo de los empleados es un pilar fundamental para el fortalecimiento de los servicios públicos. Este proceso no solo beneficia a los empleados en términos de crecimiento profesional y satisfacción laboral, sino que también repercute positivamente en la eficiencia y efectividad de las instituciones gubernamentales (Euroinnova, 2024, parr., 1).

Finalmente, en un documento de la Organización de Estados Americanos (OEA, 2007), se discute cómo un adecuado diseño institucional puede mejorar significativamente las relaciones entre gobierno y sociedad civil. Este argumento racional resalta aún más la necesidad de formar continuamente a los funcionarios para cumplir con estos estándares. El alcance y significado de la literatura seleccionada es amplio y relevante por su contenido. Cada uno de estos estudios aporta perspectivas únicas sobre cómo mejorar tanto la gobernanza como la gobernabilidad mediante una adecuada formación continua. A nivel internacional, estos trabajos son muy conocidos por los expertos en la materia ya que ofrecen marcos teóricos y prácticos aplicables a diversas realidades políticas. Los aportes más destacados detectados por los autores de esta investigación incluyen:

- Guzmán (2003) subraya la importancia del consenso social en el diseño normativo.
- El estudio sobre gobernabilidad y democracia enfatiza el papel activo del ciudadano en la construcción de su propia realidad (IDEA, 2022).
- La investigación sobre gobernanza resalta cómo entender las demandas sociales puede transformar políticas públicas. (Instituto Internacional para la Democracia y la Asistencia Electoral, 2021)
- El artículo sobre desarrollo enfatiza habilidades interpersonales como esenciales para el servicio público (Euroinnova, 2024).
- Finalmente, el documento sobre las dimensiones políticas de la gobernanza destaca cómo un buen diseño institucional puede prevenir crisis democráticas (OEA, 2007).

En una mirada de síntesis, los argumentos más convincentes extraídos de estas obras indican que una adecuada formación continua no solo mejora las competencias individuales, sino que también fortalece las instituciones democráticas. Esta realidad resulta esencial para maximizar tanto la gobernanza como la gobernabilidad democrática en un mundo cada vez más complejo e interconectado.

METODOLOGÍA

La hermenéutica de fuentes documentales se presenta como una metodología primordial para interpretar la información proveniente de un conjunto de documentos de alto valor científico. Al decir de Gadamer (2004), esta herramienta cognitiva permite interpretar y comprender el contexto, significado y relevancia de las fuentes, especialmente aquellas publicadas en revistas indexadas en bases de datos reconocidas como WOS, Scopus, Redalyc y Scielo. En general, la hermenéutica no solo se centra en el contenido explícito de un texto determinado, sino que también busca desentrañar las implicaciones subyacentes y las conexiones entre diferentes textos y contextos (Foucault, 2002). Este método es particularmente eficaz en el ámbito de la investigación social, donde la interpretación crítica puede revelar distintas perspectivas sobre la formación continua de los funcionarios públicos y su impacto en la gobernanza democrática.

Por su parte, la mayéutica socrática, significa un método de naturaleza filosófica basado en el diálogo y la indagación intersubjetiva, en consecuencia, para autores como Russell (2002) y Ferrater (2004), se aplica con éxito en diversas disciplinas para fomentar el pensamiento crítico y la reflexión profunda en términos dialógicos. Más concretamente la mayéutica consiste en formular preguntas que llevan a los interlocutores a descubrir respuestas por sí mismos, promoviendo así un aprendizaje activo. En el contexto de la formación continua de funcionarios públicos, la mayéutica puede facilitar discusiones sobre prácticas y políticas que afectan la gobernanza. Al involucrar a los autores de la investigación en un proceso hermenéutico y reflexivo, se lograron identificar áreas de mejora y, más aún, generar propuestas innovadoras que respondan a las necesidades sociales.

CUADRO 1. Abordaje mayéutico y hermenéutico de las fuentes documentales

MAYÉUTICA SOCRÁTICA		
Objetivo general de la investigación	Preguntas formuladas	Observaciones
Describir la importancia social de la formación continua de los funcionarios públicos para maximizar la gobernanza y la gobernabilidad democrática en el siglo XXI.	¿Cómo puede la formación continua transformar la percepción pública sobre el gobierno? ¿Qué papel juegan los valores éticos en el desarrollo profesional de los funcionarios? ¿De qué manera influye la capacitación en la legitimidad del Estado? Y ¿Es posible valorar (cualitativa y cuantitativamente) el impacto social de una mejor formación de los funcionarios públicos en términos de confianza ciudadana?	La última pregunta, remite por su complejidad inmanente, al desarrollo de una línea de investigación que puede ser implementada en diferentes contextos, con posibles resultados divergentes.

Fuente: elaborado por los autores (2024).

Como es normal en los procesos de exploración científica, el desarrollo de esta investigación implicó varias etapas clave que siguen la metodología planteada. En primer lugar, se llevará a cabo una revisión exhaustiva de la literatura existente (literatura seleccionada) sobre la formación continua y su relación con la gobernanza democrática. Posteriormente, se analizarán los datos recopilados utilizando técnicas cualitativas que permitan identificar patrones y tendencias, tales como: el círculo hermenéutico y la triangulación¹. Finalmente, se elaboró un informe que sintetiza los hallazgos y propone algunas recomendaciones para mejorar los programas de formación continua del funcionario. Para los autores de este artículo, esta estructura garantiza una visión sistemática y riguroso en el análisis del tema, típica de las metodologías cualitativas, inductivas e ideográficas.

Finalmente, conviene aclarar que las bases epistemológicas de esta metodología se fundamentan en la combinación dialéctica de enfoques: filosóficos, documentales y cualitativos, los cuales en su conjunto fueron esenciales para estudiar la importancia social de la formación continua de los funcionarios públicos. Desde una perspectiva filosófica, se considera que el conocimiento es construido socialmente y debe ser contextualizado dentro del marco político y social actual para adquiera toda su significación (Tovar-Sánchez & Rodríguez-Salazar, 2020).

La revisión documental, por su parte, permite acceder a investigaciones previas que enriquecen el análisis y proporcionan un marco teórico sólido para el posterior despliegue hermenéutico que entrelaza textos y contextos. Finalmente, el paradigma cualitativo facilita una comprensión profunda del fenómeno estudiado al centrarse en las experiencias vividas por los funcionarios públicos. Por lo tanto, esta metódica híbrida asegura, al menos lógicamente, que la investigación no solo sea relevante desde el punto de vista académico, sino también aplicable a la práctica profesional y social.

¹Para los efectos particulares de esta investigación la triangulación se refiere específicamente a el proceso mediante el cual se combina la información teórica sobre el tema, el dialogo hermenéutico con las fuentes y la opinión consensuada de los autores del artículo.

ANÁLISIS Y DISCUSIÓN DE RESULTADOS

En documentos oficiales del Banco del desarrollo de América Latina (2020), la formación continua de los funcionarios públicos tiene el potencial de transformar significativamente la percepción pública sobre el gobierno desde múltiples perspectivas. Desde un punto de vista social, por ejemplo, la capacitación constante permite a los funcionarios adaptarse mejor a las necesidades de la ciudadanía, lo que genera un mayor nivel de satisfacción y confianza en las instituciones democráticas. Antropológicamente, esta formación fomenta una cultura de aprendizaje y adaptación que es esencial en un mundo en constante cambio. Políticamente, un gobierno que invierte en la formación de sus empleados demuestra un compromiso con el desarrollo de las capacidades humanas, con la transparencia y la rendición de cuentas, lo que puede mejorar su imagen ante los ciudadanos. Por lo tanto, estratégicamente, la capacitación continua se convierte en una herramienta para enfrentar los desafíos contemporáneos, fortaleciendo así la legitimidad del gobierno.

Ante la pregunta ¿Qué papel juegan los valores éticos en el desarrollo profesional de los funcionarios? Todo indica que, desde el punto de vista ético, los valores juegan un papel importante en el desarrollo profesional de los funcionarios públicos. Socialmente, estos valores guían el comportamiento y las decisiones de los empleados, promoviendo un ambiente de trabajo basado en la integridad y el respeto intersubjetivo. En cuanto a la dimensión antropológica, para los autores de esta investigación la formación ética contribuye a construir una identidad profesional sólida que se alinea con las expectativas sociales. En términos de lo que significa el espacio público, los valores éticos son el cemento para mantener la confianza pública; un funcionario que actúa con ética es más propenso a ser visto como legítimo y digno de confianza. Finalmente, en términos legales, la incorporación de valores éticos en la formación puede ayudar a prevenir la corrupción y promover una administración pública más responsable (Taylor, 1994).

Pero ¿De qué manera influye la capacitación en la legitimidad del Estado? Al parecer el proceso cognitivo de capacitación continua también influye directamente en la legitimidad del Estado democrático desde diversas perspectivas. En los imaginarios colectivos, cuando los funcionarios están bien capacitados, son más capaces de responder a las demandas ciudadanas, lo que fortalece su legitimidad institucional (Del Hierro, 2013). Desde una perspectiva cultural, esta capacitación puede fomentar un sentido de pertenencia y responsabilidad entre los empleados públicos hacia su comunidad. En la práctica cotidiana del ejercicio del poder, un gobierno que prioriza la formación continua muestra su compromiso con el desarrollo sostenible y el bienestar social, lo que a su vez refuerza su legitimidad política en términos simbólicos. Jurídicamente, una administración pública bien capacitada es más eficiente y efectiva en la implementación de políticas públicas, lo que contribuye a una mayor confianza en las instituciones democráticas.

Finalmente ¿Es posible valorar (cualitativa y cuantitativamente) el impacto social de una mejor formación de los funcionarios públicos en términos de confianza ciudadana? Todo indica que si se puede lograr científicamente y más allá de toda duda razonable al respecto. De hecho, es posible valorar tanto cualitativa como cuantitativamente el impacto social de una mejor formación de los funcionarios públicos en términos de confianza ciudadana. Cualitativamente, se pueden realizar encuestas y entrevistas en profundidad para recoger testimonios sobre cómo ha cambiado la percepción pública tras programas específicos de capacitación (Martínez Miguelez, 2004).

Cuantitativamente, se pueden analizar indicadores como el aumento en los niveles de satisfacción ciudadana o la disminución en denuncias por corrupción después de implementar programas

formativos. Por ejemplo, un estudio mostró que, tras una capacitación específica en atención al ciudadano, se observó un incremento del 2.3 a 6.5% en la satisfacción con el servicio público entre usuarios en áreas metropolitanas (Banco del desarrollo de América Latina, 2020). Otro ejemplo se encuentra en el análisis sobre políticas educativas, para el caso específico de Ucrania, donde se menciona cómo cambios incrementales en la formación docente han llevado a mejoras significativas en el desempeño escolar y satisfacción general con el sistema educativo en general (Verkhovod, Oleksenko, Chernenko, Semenova, & Mazurenko, 2024).

Toda la evidencia disponible muestra al entendimiento que, la formación continua es la herramienta clave para, por una parte, mejorar las competencias individuales de los funcionarios públicos y; por la otra, para transformar positivamente la percepción pública sobre el gobierno. En este hilo conductor, a través del fortalecimiento de valores éticos y habilidades prácticas, se puede lograr una mayor legitimidad del Estado democrático. La capacidad para medir o valorar este impacto social, tanto cualitativa como cuantitativamente, proporciona herramientas valiosas para evaluar y mejorar continuamente estos programas formativos en cada contexto diferenciado. En última instancia, invertir en la capacitación continua no solo beneficia a los funcionarios individuales, sino que también contribuye a construir sociedades más justas y democráticas, de cara al logro de los objetivos para el desarrollo sostenible (Asamblea General de Naciones Unidas, 2018).

CONCLUSIONES Y RECOMENDACIONES

Al menos para los autores de esta investigación, el debate actual sobre la importancia social de la formación continua de los funcionarios públicos se centra en su fuerza para lograr una gobernanza y gobernabilidad democrática efectivas, especialmente en el contexto de las sociedades digitales del siglo XXI. Aquí, la ciudadanía informada percibe que la capacitación constante de los empleados públicos no solo mejora la calidad del servicio, sino que también fortalece la confianza en las instituciones públicas en todo el desarrollo civilizacional (Nikitenko et al., 2023). En una era donde la tecnología y la transparencia son cada vez más relevantes, los ciudadanos exigen, legitimante, un gobierno que responda a sus necesidades y expectativas. De modo que, la formación continua se convierte, por lo tanto, en un requisito indispensable para que los funcionarios puedan adaptarse a las nuevas realidades y demandas sociales, complejas y dinámicas.

En los dominios de la opinión pública, este proceso de formación es visto como una condición necesaria para fomentar una cultura de participación ciudadana activa. La “capacidad hermenéutica” de los funcionarios públicos de vanguardia para interactuar con la comunidad y comprender sus inquietudes se ve directamente influenciada por su nivel de capacitación continua. En este sentido, queda claro que los ciudadanos esperan que sus “representantes y servidores” sean competentes y estén bien informados sobre las políticas públicas que afectan sus vidas cotidianas. En contraste, la falta de formación puede llevar a una desconexión entre el gobierno y la ciudadanía, lo que a su vez puede socavar la legitimidad del Estado y debilitar la gobernabilidad democrática. Por lo tanto, resulta muy importante que se priorice la formación continua en el ámbito público.

Para facilitar el proceso de formación continua de los funcionarios públicos, se pueden proponer tres enfoques o modo de propuesta: filosófico, político y administrativo.

- Desde una perspectiva filosófica, se debe promover una cultura del aprendizaje continuo que valore el desarrollo profesional como un componente clave del servicio público.

- Políticamente, los gobiernos deben establecer políticas claras que incentiven la capacitación y asignen recursos adecuados para su implementación.
- Finalmente, desde el ámbito administrativo, hay que desarrollar programas de formación de vanguardia que sean accesibles y relevantes para las necesidades específicas de cada entidad pública, asegurando así su efectividad en tiempo y el espacio.

El sentido y alcance general de estas propuestas deben ser considerados a la luz de las dinámicas sociales actuales, donde la inteligencia artificial (IA) puede sustituir paulatinamente a muchos funcionarios públicos. En este contexto, es vital que los empleados públicos estén preparados no solo para trabajar junto a tecnologías avanzadas, sino también para liderar cambios estructurales en sus organizaciones. En consecuencia, el proceso de formación continua debe incluir competencias digitales y habilidades interpersonales que les permitan al funcionario adaptarse a un entorno laboral en constante evolución. Esta situación internacional no solo garantizará la relevancia humana en el futuro del trabajo público, sino que también asegurará que sigan siendo agentes efectivos en la promoción de una gobernanza democrática.

Por todas las razones aludidas a lo largo del artículo, la formación continua de los funcionarios públicos es una herramienta importante cuando se busca maximizar la gobernanza y la gobernabilidad democrática en el siglo XXI. Y es que, a medida que las sociedades se vuelven más complejas y digitalizadas, los empleados públicos deben estar equipados con las habilidades y destrezas necesarias para enfrentar estos desafíos digitales y materiales, abstractos y concretos. Las propuestas filosóficas, políticas y administrativas presentadas ofrecen un marco consistente para desarrollar esta capacitación. Si se logra hacerlo, se fortalecerá en cada momento la confianza ciudadana en las instituciones y, también, el compromiso con un gobierno más transparente y participativo al servicio de todos (Nikitenko et al., 2024).

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El papel mediador de las habilidades comunicativas en la relación entre el emprendimiento multidimensional y las habilidades personales

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Resumen. Las habilidades de comunicación son factores cruciales e influyentes que impactan muchos problemas personales y sociales. Hoy en día, en varios países se enfatiza la mejora de estas habilidades entre individuos y empleados. El artículo tiene como objetivo mostrar el papel mediador de las habilidades comunicativas en la relación entre el emprendimiento multidimensional y las habilidades personales entre empleados de instituciones gubernamentales y públicas. Para ello, se utilizó un método de muestreo por conglomerados y se recopilaron 360 cuestionarios de empleados que trabajan en una organización gubernamental. Luego de evaluar la validez y confiabilidad del instrumento, se realizó un análisis de mediación. Los resultados indicaron una relación significativa entre las habilidades de comunicación, el emprendimiento multidimensional y las habilidades personales. El análisis de la mediación también reveló que las habilidades de comunicación median significativamente la relación entre las dimensiones de creatividad, confianza y resolución de problemas.

Palabras clave: habilidades comunicativas, emprendimiento multidimensional, habilidades personales, análisis de mediación, creatividad.

The mediating role of communication skills in the relationship between multidimensional entrepreneurship and personal skills

Abstract. Communication skills are crucial and influential factors that impact many personal and social issues. Today, in several countries, the improvement of these skills among individuals and employees is emphasized. The article aims to show the mediating role of communication skills in the relationship between multidimensional entrepreneurship and personal skills between employees of government and public institutions. To do this, a cluster sampling method was used and 360 questionnaires were collected from employees working in a government organization. After evaluating the validity and reliability of the instrument, a mediation analysis was performed. The results indicated a significant relationship between communication skills, multidimensional entrepreneurship and personal skills. The mediation analysis also revealed that communication skills significantly mediate the relationship between the dimensions of creativity, confidence, and problem-solving.

Keywords: communication skills, multidimensional entrepreneurship, personal skills, mediation analysis, creativity.

INTRODUCTION

Entrepreneurship has evolved beyond its traditional, one-dimensional, and primarily economic definition. It is now discussed within a multidimensional framework encompassing organizational, social, cultural, and technological aspects. This raises the question: do governmental organizations, particularly their leaders, require multidimensional entrepreneurial skills to achieve economic, social, cultural, and technological productivity? Research in this area has demonstrated that multidimensional entrepreneurial skills are an integral part of organizations and human resource management (Yamada, 2004; Westlund, 2011; Valliere, 2017). Consequently, various classifications of entrepreneurial traits and characteristics are presented in the literature. Some scholars categorize entrepreneurial traits into personal and behavioral characteristics.

Among the personal characteristics highlighted in these studies are achievement orientation, self-confidence, determination, talent and intelligence, adaptability, influence over others, energy and perseverance, foresight, responsiveness to challenges, openness to suggestions and criticism, quick decision-making ability, responsibility, perfectionism, positive attitude, faith, adaptability and flexibility, ability to learn from mistakes, drive, pride, imagination, spontaneity, vision, pattern recognition, assertiveness, risk-taking, persistence, creativity, efficiency, tolerance for ambiguity, work commitment, independence, sensitivity to others, internal locus of control, honesty and integrity, altruism, skillfulness, positive mental states, self-esteem, an indomitable spirit, wealth-seeking, ambition, growth-mindedness, and more. These variables are drawn from the studies of Salehi Sadaghiani (2009), Cooper et al. (1994), Dees (2001), Brown et al. (2004), and Zahra et al. (2008).

Behavioral characteristics include innovation, perseverance and determination, risk management, balanced judgment, opportunity recognition and pursuit, behavioral balance, cooperative

spirit, goal orientation, and the need for achievement (Salehi Sadaghiani, 2009; Mort et al., 2002). Some studies do not provide a specific classification but instead broadly describe the characteristics of entrepreneurs. For example, McClelland (1961) identifies the need for achievement, risk-taking propensity, internal locus of control, creativity, and independence as the characteristics of entrepreneurs. Abdul (2018) categorizes entrepreneurial skills into four groups: personal skills (problem-solving, creative thinking); interpersonal skills (motivating others, managing conflicts); group skills (leading others, teamwork); and additional skills (communication).

Poczwardowski et al. (2002) argue that since specific behaviors are contingent on particular situations, successful managers, in their pursuit of organizational goals, aim to anticipate, guide, control, and modify employee behavior. This process requires extensive research given individual differences, the expansion of human communications in the modern world, and cultural variances across societies. Establishing communication evokes a sense of social belonging in individuals, and through this interaction, they acquire new skills and perspectives. This extends to the point where organizations expand and grow. Communication involves the transfer of information from the sender to the receiver in a manner that is clear and comprehensible to both. If any of the essential components (sender, receiver, or message) are missing, communication does not occur (Sullivan et al., 2004).

Numerous studies have shown that training in communication skills positively impacts mental and physical health, boosts self-confidence and self-respect, strengthens interpersonal relationships, prevents psychological, behavioral, and social problems, and reduces anxiety, depression, and academic decline (Taremian et al., 1999, p. 28). Communication skills are those capabilities that enable individuals to engage in interpersonal interactions and the communication process; this process involves individuals sharing their information, thoughts, and emotions through verbal and non-verbal exchanges (Hargie & Dickson, 2004, p. 66). These skills are so significant that lacking them has been linked to feelings of loneliness, social anxiety, depression, low self-esteem, and failure in academic and professional settings (Williamson & X, 2001). Shabbir et al. (2016) categorize entrepreneurial skills into four main areas: recognizing and generating new ideas, utilizing these ideas, creative traits and behaviors, and managerial and leadership skills.

Garalis and Strazdiene (2007) divide entrepreneurial skills into three main categories: social skills, professional skills, and technological skills. Horensby et al. (1993) identify personal traits such as extraversion, adaptability, openness, sensitivity, and conscientiousness, alongside process-related variables like managerial support, job autonomy, reinforcement and rewards, time accessibility, and organizational boundaries, as key to successful entrepreneurship. In theory, each type of entrepreneurial skill (economic, organizational, social, etc.) can independently have a positive impact on organizational efficiency, as demonstrated in various studies (e.g., Yamada, 2004; Westlund, 2011; Vallier, 2017). However, in practice, multidimensional entrepreneurial skills can either neutralize or reinforce each other. For instance, some skills may have a positive effect on one another, while others might have negative interactions (Westlund, 2011).

To our knowledge, prior research has not examined the mediating role of communication skills in the relationship between multidimensional entrepreneurship and personal skills. Therefore, conducting such a study appears essential to fill this research and knowledge gap. The present research aims to address the question: how does multidimensional entrepreneurship impact personal skills, with communication skills acting as a mediator?

Theoretical Framework and Hypothesis Development

Value creation is the essence of entrepreneurship, and an entrepreneur is someone capable of generating value, whether material or intangible. To achieve this, an entrepreneur must adopt a different lifestyle and mindset. Hence, entrepreneurship is not merely a job or profession; it is a way of life, a mindset, or a cultural framework encompassing specific beliefs, values, and practices (Samadaghahi, 1999). Kuratko and Hodgetts (2004) described entrepreneurship as a dynamic process involving vision, transformation, and creativity. This process relies on the utilization of individuals' energy and motivation to generate and implement new ideas and practical solutions.

Westlund (2011) explored multidimensional entrepreneurship and argued that existing definitions are often oversimplified. He views multidimensional entrepreneurship as a chain of activities, including the discovery of opportunities, their evaluation, and resource mobilization to exploit these opportunities across different entrepreneurial contexts—organizational, economic, social, cultural, political, and technological. These six forms of entrepreneurship may influence each other, though the direction of these effects can vary.

Ples (1996) found that researchers often possess the ability to work simultaneously across various research activities, absorb strong ideas, and acquire skills in multiple areas. Individual factors and personal traits also play significant roles. Murphy (1991) defined personality as a set of characteristics that determine a person's consistent response patterns to situations. Conscientious individuals can focus on multiple goals and work hard to achieve them. Personal traits such as creativity, risk-taking, perseverance, patience, and self-efficacy facilitate innovation. Five personality traits—differentiating creative individuals—along with intrinsic motivation (needs, interests, curiosity, and the feeling of joy) are more influential in fostering creativity than extrinsic motivation (rewards, external approval) (Barani & Rezaei, 2021).

Several researchers have confirmed the relationship between these variables. For example, Dehmardeh Ghalehno et al. (2015) studied entrepreneurial training models and highlighted that personal skills can impact entrepreneurship. Similarly, Samandar Habashi et al. (2016) investigated the effects of entrepreneurial education on the ability to recognize entrepreneurial opportunities, showing that such education influences six factors: active search, alertness, prior knowledge, social capital, environmental factors, and cognitive and individual characteristics.

Hornsby (1993) presented an interactive model of the corporate entrepreneurial process, incorporating individual characteristics such as risk-taking propensity, desire for autonomy, need for achievement, goal orientation, and internal locus of control alongside organizational characteristics such as management support, work discretion, reinforcement/rewards, time availability, and organizational boundaries. Abdul (2018) conducted a comparative analysis of entrepreneurial skills and SME growth in Nigeria and the UK, identifying four categories of entrepreneurial skills: personal skills (problem-solving, creative thinking); interpersonal skills (motivating others, managing conflicts); group skills (leading others, teamwork); and additional skills (communication).

Based on these explanations, the first hypothesis can be stated as follows:

H₁: There is a significant relationship between multidimensional entrepreneurship and personal skills.

Communication skills refer to the ability to establish effective and healthy interactions with others, which includes clear verbal communication, active listening, understanding the other person's perspective, and providing appropriate feedback (Moore et al., 2018). Scholars have elaborated on communication skills in various ways. One perspective sees empathy as understanding another's emotions and having an internal connection to them. In communication, empathy means sharing a sense of unity where both the sender and receiver of a message reach a common understanding. Empathy allows an individual to adapt to their social environment, become self-aware of their actions, and develop effective communication based on understanding.

Truax (1961) highlighted the importance of communication skills, stating that a person's communication capability is linked to their definition of empathy. Communication skills are largely learned, and the primary reason for communication failures is the lack of proper understanding of messages and challenges stemming from misunderstandings (Vahabi et al., 2016). Communication skills involve a set of actions and interactions that fulfill individuals' needs and appear as a human necessity in communal life. Establishing interpersonal connections provides motivation, growth, a sense of usefulness, satisfaction, mutual understanding, and trust (Rahmanipour et al., 2020).

Zare and Safari (2019) designed a paradigm model of social entrepreneurship with a focus on empowering female-headed households. Shabbir et al. (2016) explored factors determining entrepreneurial skills in Pakistan, categorizing these skills into four areas: recognizing and generating new ideas, utilizing these ideas, creative traits and behaviors, and managerial and leadership skills. Sousa (2018) identified entrepreneurial skills in higher education as follows: capacity to be innovative and creative; capacity to diversify the business area; capability to identify and exploit new business opportunities; project management skills; ability and willingness to take risk; ability to organize resources to respond to opportunities; and capability to create and develop national and international networks.

Westlund (2011) examined multidimensional entrepreneurship, critiquing simplistic definitions and describing entrepreneurship as a chain of activities such as identifying opportunities, evaluating them, and mobilizing resources to leverage these opportunities across different domains, including organizational, economic, social, cultural, political, and technological entrepreneurship. These six dimensions of entrepreneurship interact, potentially influencing each other in varied directions. Finally, Dees (2001) explored strategic factors critical to social entrepreneurs, emphasizing continuous opportunity identification, ongoing innovation, flexibility, learning, acting beyond available resources, and accountability as key traits.

Accordingly, the second research hypothesis can be formulated as follows:

H₂: Communication skills mediate the relationship between multidimensional entrepreneurship and personal skills.

Based on the discussed theoretical framework, the present research proposes the following conceptual model:

Figure 1. The proposed conceptual model.

METHODOLOGY

Population and Sample

The statistical population for this study included all employees and managers of the Iranian Customs, totaling 5,738 individuals. Using cluster sampling, questionnaires were sent to 10% of the population (574 individuals) via email. The recipients were informed that their names and responses would remain confidential and would only be used for the analysis. Out of these, 393 questionnaires were returned. After discarding incomplete or invalid responses, 358 valid questionnaires were used in the analysis. The respondents comprised a mix of men and women, with most falling within the 31-40 age group. The highest percentage of respondents held MSc while individuals with 11-15 years of experience made up 31.4 % of the total. Detailed information on respondents' demographic characteristics is provided in Table 1.

TABLE 1. Te profile of respondants

Age	%	Gender:	%
20-30	1.1	Male	78.9
31-40	43.7	Female	20.6
41-50	34.1		
51-60	20.3		
		Education	
		HS Diploma	2.00
		BSc	45.6
		MSc	49.4
		PhD	2.8
		No answer	.02
Experiences			
5-10	18.9		
11-15	31.4		
16-20	19.4		
21 and more	30.3		

Data Collection Instrument

The first section of the questionnaire included demographic questions such as gender, education level, age, field of study, work experience, and type of employment. The second section focused on measuring the variables. A custom questionnaire was used to assess the characteristics of multidimensional entrepreneurs. This questionnaire consisted of 45 closed-ended items rated on a Likert scale (ranging from "very high" to "very low"), based on Valliere's (2017) definition and with 'multidimensional entrepreneurship intent', 'creativity', 'trust', and 'problem-solving' as the main components.

The remaining sections of the structured questionnaire examined skill-related dimensions, including leadership skills, human relations skills, technical skills, and innate ability, derived from previous studies. Leadership was adapted from Jong and Hartog (2007), human relations from Adejimola (2008), technical skills from Chandler and Jansen (1992), and innate ability from Silva (2006). Respondents rated the items on a 5-point Likert scale from 1 (“very low”) to 5 (“very high”).

The dependent variable, “multidimensional entrepreneurship skills,” comprising constructs such as ‘critical thinking’, ‘creativity’, and ‘problem-solving’, was adapted from Prüfer and Prüfer (2020). The validity of the questionnaire, assessed by experts using the CVR formula, was 0.89. The reliability, determined by Cronbach’s alpha, was 0.81.

Statistical Analysis

The collected data were analyzed in two phases: descriptive and inferential statistics. Given the normal distribution of the data, structural equation modeling (SEM) was employed, which requires normality in the observations.

The study utilized advanced statistical techniques, including correlation analysis and the Hayes’ PROCESS macro for SPSS (2017), calculated using SPSS version 24.0.

RESULTS

Table 2 presents the means, standard deviations, and correlation coefficients of the variables. In alignment with the hypotheses, personal skills related to communication showed a significant positive correlation ($r = 0.73$, $p < 0.01$), as did the relationships between communication skills and the constructs of multidimensional entrepreneurship skills: creativity ($r = 0.59$, $p < 0.01$), critical thinking ($r = 0.36$, $p < 0.01$), and problem-solving ($r = 0.44$, $p < 0.01$).

The mean and standard deviation for personal skills were 3.92 and 0.83, respectively. Communication skills had a mean of 4.02 and a standard deviation of 0.809. Problem-solving had the lowest mean at 3.25, with a standard deviation of 0.66. Table 2 provides comprehensive information on correlation coefficients, means, and variances of the variables.

Hypothesis Testing

To test the mediating role of leadership styles, Model 4 was applied, controlling for demographic variables (age, education). The results generated using Hayes’ PROCESS macro for SPSS (2017) are shown in Table 2. Communication skills significantly predicted creativity ($\beta = 1.41$, $t = 1.442$; see Table 2). However, the mediation analysis did not yield significant results for critical thinking ($\beta = 1.77$, $t = 0.362$) or problem-solving ($\beta = 1.42$, $t = 0.11$), leading to the rejection of Hypotheses H21 and H22. Thus, the mediating path between communication skills and multidimensional entrepreneurship skills is significant.

TABLE 2. Correlations between the variables

Variables	1	2	3	4	M	SD	Cronbach's alpha
Personal skills	--				3.92	.838	.88
Communication skills	.73**	--			4.02	.809	.91
Creativity	.63**	.59**	--		3.99	.881	.90
Critical thinking	.08	.36**	.43**	--	4.12	.793	.76
Problem-solving	.46**	.44**	-.21**	.35**	3.25	.660	.84

TABLE 3. Mediating result

	Creativity $R^2=.04$			Critical thinking $R^2=.02$			Problem-solving $R^2=.05$		
	B	SE	95% CI LLCI, ULCI	B	SE	95% CI LLCI, ULCI	B	SE	95% CI LLCI, ULCI
Constant	2.17	.33	1.41, 2.68	2.33	.42	1.01, 2.08	1.97	.29	1.61, 2.88
Age	-.09	.07	.09, .05	.05	.06	.09, .05	.10	.05	.09, .05
Education	-.09	.056	-.08, .19	.07	.041	.11, 1.42	.13	.055	.04, .25
Communication skills	1.41	.16	.13, .18	1.77	.19	.14, .28	1.42	.11	.08, .21

CONCLUSION

The purpose of this research was to examine the role of communication skills in mediating the relationship between employees' personal skills and their entrepreneurial skills. Among various entrepreneurial skills, the results showed that communication skills can mediate the effect of personal skills on problem-solving, creativity, and critical thinking. Essentially, individuals with strong communication skills can leverage their ability to transfer and share knowledge effectively for problem-solving. Such individuals can better receive information and share it appropriately with others, using problem-solving skills to manage conflicts and increase their influence within the workplace.

Moreover, people with high communication skills can easily connect with others holding different viewpoints, helping them to understand and engage with diverse perspectives. This ability allows them to approach issues from multiple angles, fostering creativity and generating new ideas in various situations. Additionally, effective communication helps individuals listen to differing opinions, demonstrating greater openness and adaptability, and ultimately enhancing their critical evaluation of various situations.

This research highlights that communication skills play a crucial role in harnessing personal skills to develop entrepreneurial abilities. Therefore, individuals with strong personal capabilities can achieve better outcomes by strengthening their communication skills.

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La interacción entre valores socioculturales, comportamiento y bienestar: Rasgos destacados de la inteligencia social

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Resumen. Hoy en día, los estudiantes se ven obligados a navegar por una dinámica social intrincada, exhibiendo una profunda capacidad de comprensión empática y adaptándose rápidamente a diversas demandas situacionales. Su espíritu sociocultural está arraigado en un entramado de normas, tradiciones y sistemas de creencias culturales, que dan forma a sus interacciones y su visión del mundo. Las virtudes y fortalezas del carácter se asocian positivamente con el enfoque de estrategias de afrontamiento entre los estudiantes universitarios, facilitando el crecimiento personal y la adaptación a situaciones desafiantes. Este estudio explora factores clave y rasgos destacados de la inteligencia social entre estudiantes universitarios dentro de un contexto sociocultural. Los valores humanos, vistos como creencias internas y objetivos finales, desempeñan un papel crucial en la configuración del comportamiento y las actitudes. La inteligencia social, vinculada a la satisfacción con la vida y al desempeño profesional, abarca rasgos como la perspectiva, el entusiasmo, el liderazgo y la alegría. Se tomó una muestra representativa de 355 estudiantes de facultad, entre estudiantes de pregrado y maestría. El análisis de datos utilizando SPSS reveló correlaciones estadísticamente significativas entre los rasgos de carácter y la inteligencia social. El estudio enfatiza la importancia de la inteligencia social para navegar en interacciones sociales complejas y lograr el éxito en la sociedad. Se subraya la importancia de la inteligencia social, los rasgos de personalidad y los valores en el fomento de un comportamiento positivo. Al comprender y cultivar estos rasgos, las personas pueden adaptarse mejor a su entorno y promover relaciones sociales armoniosas.

Palabras clave: inteligencia social, valores socioculturales, rasgos de carácter, crecimiento personal, desempeño profesional.

The interplay between sociocultural values, behavior and well-being: salient traits of social intelligence

Abstract. Today, students are forced to navigate intricate social dynamics, exhibiting a deep capacity for empathic understanding and adapting quickly to various situational demands. Their socio-cultural spirit is rooted in a web of cultural norms, traditions, and belief systems, which shape their interactions and worldview. Character virtues and strengths are positively associated with the approach of coping strategies among university students, facilitating personal growth and adaptation to challenging situations. This study explores key factors and salient traits of social intelligence among university students within a sociocultural context. Human values, seen as internal beliefs and end goals, play a crucial role in shaping behavior and attitudes. Social intelligence, linked to life satisfaction and professional performance, encompasses traits such as perspective, enthusiasm, leadership and joy. A representative sample of 355 faculty students was taken, including undergraduate and master's students. Data analysis using SPSS revealed statistically significant correlations between character traits and social intelligence. The study emphasizes the importance of social intelligence in navigating complex social interactions and achieving success in society. The importance of social intelligence, personality traits and values in promoting positive behaviour is underlined. By understanding and cultivating these traits, people can better adapt to their environment and promote harmonious social relationships.

Keywords: social intelligence, sociocultural values, character traits, personal growth, professional performance.

INTRODUCTION

The role of universities in shaping the future of students is multifaceted, extending beyond academic instruction to the development of character strengths and personality traits. This study explores the prevalence of certain character strengths among students and their correlation with social intelligence. The study's methodology and findings provide valuable insights for educational institutions and underscore the importance of nurturing non-academic competencies.

Socio-emotional intelligence is crucial in various aspects of life, including the workplace, academic settings, personal relationships, and self-development. High levels of emotional and social intelligence are linked to positive outcomes such as better mental health, job performance, behavior, and interpersonal relationships (Huerta Cuervo et al., 2022), contributing to a more conducive learning environment and better educational outcomes (Lathifah & Usman, 2019).

In the context of evolving quality education, researchers are investigating diverse methodologies to enhance students' social intelligence. This exploration is conducted with due consideration for individual developmental trajectories and a focus on lifelong learning outcomes. The emphasis is on cultivating students' capacities for effective social interaction and autonomous navigation of interpersonal challenges. The quality of these interpersonal relationships serves as a barometer for the degree to which both students and educators comprehend the social dynamics within educational environments. This multifaceted approach reflects a growing recognition of the importance of social skills in educational development (Wang, 2024).

Human values, representing inner beliefs and ultimate goals, are instrumental in shaping behavior and attitudes. Emotional intelligence is one of the most studied concepts in psychological literature (Vaida & Opre, 2014). Social intelligence, defined by Goleman as the capacity to understand and manage social relationships, is equally key in navigating the educational environment (Goleman, 2010). The educators' role includes understanding students' behavior and encouraging their abilities to social interactions (Yao, 2023).

This study presents compelling research at the intersection of character strengths, psychological well-being, and social intelligence, particularly in academic and professional settings. The paper tackles on a fascinating aspect of how implicit beliefs shape academic outcomes. The idea that implicit intelligence can predict academic performance emphasizes the psychological dimensions of learning. For instance, if a student believes they are "good at math," they are more likely to engage positively with the material, increasing their chances of success. This self-perception doesn't just stop at academics; it interfaces with social intelligence (Meijs, Cillessen, Scholte, Segers, & Spijkerman, 2008). For example, a student excelling in math might gain confidence, leading them to participate more in group projects or discussions. This engagement can enhance their social skills, as they learn to collaborate and communicate effectively with peers (Sik, Cummins, & Job, 2024). Moreover, the early years of education serve as a critical period for shaping these beliefs. Students who receive positive reinforcement may develop a more robust self-concept regarding their intelligence, which can foster resilience in facing academic challenges and nurturing social relationships (Starynska, 2022).

In summary, the interplay between implicit intelligence beliefs and academic performance creates a ripple effect that can enhance social intelligence, illustrating the interconnected nature of cognitive and social development in educational settings. For instance, traits like inquiring intellect and problem-solving, identified as part of social intelligence, are largely shaped by the underlying personality characteristics. It suggests that interpersonal skills and practical intelligence are rooted in broader personality traits rather than just cognitive abilities.

The findings of this study align with the hypothesis, highlighting that personality traits likely encapsulate behaviors that define social intelligence in everyday contexts, demonstrating the interconnectedness of personality and social cognition (Joseph & Lakshmi, 2010).

LITERATURE REVIEW

Knowledge and love of learning form the successful person (Pokrajčić, 2004) while human values, representing inner beliefs and ultimate goals, are instrumental in shaping behavior and attitudes. Socio-emotional intelligence, an element of humanity's virtue or value, is crucial for several reasons (Peterson & Seligman, 2004). First, it plays a significant role in the emotional well-being of individuals. People with high socio-emotional intelligence are often better equipped to handle stress, build strong relationships, and navigate social complexities. Second, socio-emotional intelligence is essential in the workplace. It contributes to effective performance by enabling individuals to work well in teams, lead others with empathy, and resolve conflicts constructively (Zeidner, Matthews, & Roberts, 2011).

The social intelligence encompasses the aptitude to navigate and adapt to social environments and interactions (Huerta Cuervo et al., 2022), the ability to manage relationships (Goleman, 2010). Socio-emotional competencies are significant factors in the performance and behavior of individu-

als. The review indicates that the concept has been used and interpreted in a diverse range of contexts throughout its historical development.

Other authors explored these concepts and the outcomes of the nuanced interplay between personality traits and social intelligence. The findings suggest that character strengths, such as love and curiosity, can act as intermediaries that translate abstract values into concrete behaviors. For example, fostering an environment where gratitude is expressed can enhance self-transcendence, which can improve interpersonal interactions. The correlation between specific character strengths and psychological well-being indicates that traits like humor and fairness contribute positively to mental health (Darvish, & Taklavi, 2023). This suggests that educational institutions could incorporate activities that enhance these strengths - like teamwork exercises that promote fairness and honest feedback. The discussion emphasizes the importance of developing social intelligence in both personal and professional contexts. Individuals with high social intelligence are portrayed as magnetic and successful, while those with low social intelligence may struggle socially. Practical implications arise here: organizations might implement training programs focusing on improving social intelligence among employees to facilitate better teamwork and reduce conflict. The mention of team coaching aligns with the need for developing social skills in a professional environment. By focusing on social awareness and filtering—two components of social intelligence—organizations can enhance collaboration and communication within teams (Lavy & Benish-Weisman, 2021; Peterson & Seligman, 2004; Quinlan, Swain, & Vella-Brodrick, 2011).

Emotional intelligence is one of the most studied concepts in psychological literature. Emotional intelligence and its relationship with emotional competence offers a critical perspective on their integration in both academic and organizational contexts (Hibbs, 2024). The symbiotic relationship between emotional intelligence and emotional competence is compelling. Vaida & Opre (2014) differentiate between emotional traits, abilities, and competence. Emotional traits are stable characteristics, such as empathy or optimism, that influence how individuals typically respond emotionally. Emotional abilities focus on specific skills or competencies, like the ability to recognize one's own emotions or those of others, and to manage these emotions effectively in various contexts. Emotional competence can be viewed as the application of emotional abilities in real-world situations, leading to effective behavior and interactions (Vaida & Opre, 2014). By refining this distinction, this study can provide a comprehensive view of the importance of both emotional intelligence and emotional competence in achieving personal and professional success.

Psychological well-being and emotional intelligence, as shaped by theories from Gardner and Sternberg and popularized by Goleman play a critical role in social intelligence. The skills involved - such as recognizing and regulating emotions - are indeed foundational for navigating social interactions. For instance, a teenager who can empathize with peers and read social cues is more likely to establish meaningful connections, boosting their sociometric popularity (acceptance among peers). Conversely, those who leverage emotional intelligence for strategic manipulation might achieve perceived popularity (social dominance), often seen in social hierarchies within schools. Research shows that adolescents with high social intelligence may engage more effectively in group dynamics, leading to greater acceptance by their peers. They might intuitively know when to offer support or when to assert themselves, which can enhance their social standing. This duality of popularity illustrates how emotional and social intelligences intersect with broader social adaptation (Goleman, 2010; Goleman, 2006).

Ultimately, emotional intelligence not only enriches individual relationships but also serves as a powerful predictor of social success, influencing how adolescents navigate complex social landscapes. An interesting study of Silman & Dogan (2013) sheds light on a critical aspect of workplace dynamics among academics, particularly regarding social intelligence and loneliness, enabling a nuanced understanding of how different dimensions of social intelligence influence feelings of loneliness. The finding that social information processing, social skills, and social awareness together account for 26% of social deprivation is significant. It indicates that academics who are adept at interpreting social cues and managing their relationships are less likely to experience feelings of isolation in the workplace. For example, an academic who actively engages with colleagues facilitates collaborative projects, or seeks mentorship may enhance their social network, thereby reducing loneliness (Silman & Dogan, 2013). Additionally, the positive correlation between social skills and social awareness with social companionship suggests that those with strong interpersonal abilities are more likely to cultivate enriching relationships. This could involve initiating informal gatherings or participating in departmental activities, fostering a sense of belonging among peers. Interestingly, the lack of a meaningful explanation from the social information processing sub-dimension regarding social companionship highlights the complexity of social interactions. It suggests that merely processing social information isn't enough to build companionship; actual engagement and skillful interaction are crucial. Overall, the findings highlight the importance of fostering social intelligence in academic settings to combat loneliness, suggesting that training in social skills and awareness could be beneficial for academics aiming to enhance their work environment and personal fulfillment (Devis-Rozental, 2018; Silman & Dogan, 2013; Yao, 2023).

Key factors for developing social intelligence

Social intelligence, which encompasses the skills to navigate social situations effectively, is vital for students' educational development and their ability to bring about progressive change in society. Students' *leadership* strength significantly influences their social intelligence in group settings, enhancing collaboration and problem-solving capabilities. Research indicates that effective leadership fosters better group dynamics and outcomes (Hernández, 2018).

Society recognizes the significance of *humor* in regulating relations between people (Yao, 2023), it is acknowledged as part of social and emotional intelligence (Belessova & Nabi, 2020). The ability to adapt and interact with others is determined by one's humor. It is recognized as a component of optimism, being positively correlated with mental health, level of intelligence, self-esteem, self-acceptance, and sociability (Artemyeva, 2017).

Wisdom, one of the six basic values of humankind, was enormously researched in the previous decennia, and different components of wisdom were elaborated. However, it still has a lot of relevance in today's challenges and needs of society (Vandamme, 2023). In this study perspective or wisdom is seen as the capacity to see the bigger picture and the ability to understand and give advice on life (Bluemke, Partsch, Saucier, & Lechner, 2021). Individuals' level of wisdom determines their life satisfaction (Rezaei & Mousanezhad Jeddi, 2018) and supports their development in different fields. As a society, the level of wisdom determines its prosperity capacity, education being the capstone in wisdom gaining (Ma, Zhu, Li, Zhang, & Tian, 2022).

Enthusiasm seems to be transmissible (Moreno, 2022). Several studies focus on students' enthusiasm for learning (Ma Q., 2022; Tao & Yang, 2023) and teachers' enthusiasm in motivating students' learning (Kim & Schallert, 2014). Students' academic enthusiasm is crucial for their engagement, passion for learning, and success (Ozbakpoor, Karbalaei Harafteh, & Salimi, 2024).

Courage, often perceived as the ability to confront fear, pain, danger, uncertainty, or intimidation, plays a pivotal role in students' personal development and academic achievement (Goleman, Emotional Intelligence, 2010). For students, courage is instrumental in facing academic and social challenges. It is associated with a greater sense of purpose and life satisfaction later in life (Renzulli, 2009). Moreover, courageous adolescents and adults are more likely to actively use coping strategies (Gustems-Carnicer & Calderón, 2015), such as seeking social support and engaging in positive problem-solving (Birden, 2021). In the workplace, courage mediates on quality of life, well-being, and life satisfaction (Mert, Sen, & Alzghol, 2022; Santisi, Lodi, Magnano, Zarbo, & Zammitti, 2000).

The character strength *love of learning* is a positive personality trait that involves a deep and enduring passion for acquiring new knowledge and skills, it is not only about the initial curiosity but also about the ongoing process of learning and the satisfaction derived from it. The love of learning is associated with various positive outcomes in educational and personal contexts, contributing to both academic success and personal well-being (Muhammad Diponegoro & Hanurawan, 2022; Lyons, Lyons, & Jolley, 2019).

The research is progressively acknowledging the implication of character strengths in society. The interdependence between social intelligence and the presented key factors is analyzed in this research.

RESEARCH METHODOLOGY

Quantitative data on specific students' personality traits was collected via an online self-report questionnaire. The instrument was developed and made available online in Romanian and English to facilitate foreign student participation. The survey sample consisted of undergraduate and post-graduate students enrolled in the faculty. The questionnaire included demographic variables and 7 personality strength variables: social intelligence, perspective/wisdom, zest/enthusiasm/vitality, leadership, love of learning, humor/playfulness, and valor/bravery/courage. These character strength scales defined based on the study of Bluemke, et al. (2021), were measured using a 5-point Likert scale, each variable being assessed by 4 items. The data were analyzed using the Statistical Package for the Social Sciences program (SPSS) version 29 for Windows.

The study population consisted of 1,671 students enrolled at the Faculty of Business during the 2023-2024 academic year. To ensure the sample was representative of this population, the calculated required sample size was determined to be 313 participants assuming a 5% margin of error and a 95% confidence level. The study engaged 355 students, surpassing the minimum threshold for statistical representativeness. This high sample coverage strengthens confidence in the reliability and generalizability of the research findings.

Universities stand as a cornerstone in the architecture of social progression, tasked with the critical mission of nurturing the finest human capital. This mission transcends beyond mere preparation for existing market demands, venturing into the realm of fostering social intelligence and behaviors that contribute to a more equitable and sustainable future. In the light of this, the present research report delves into examining the character strengths prevalent among students, with the objective of determining the degree to which these students exhibit the character strengths that support their personal and professional growth in a rapidly changing society.

TABLE 1. Demographic variables

Variable	Items	Percent
Nationality	Romanian	91.83%
	Others	8.17%
Gender:	Masculine	38.87%
	Feminine	60.28%
	Prefer not to say	0.85%
Age	18-25 years	93.52%
	26-35 years	5.07%
	36-45 years	1.13%
	46-55 years	0.28%
Studying year	Bachelor's First year	47.89%
	Bachelor's Second year	30.14%
	Bachelor's Third year	15.49%
	Master's first year	2.82%
	Master's second year	3.66%
Employment	I don't work	67.04%
	I am a full-time employee	10.42%
	I am a part-time employee	13.24%
	I am employed on hourly pay	3.38%
	I am self-employed (freelancer)	5.92%

Source: Authors' calculations.

The sample size for the study is 355 participants. Gender distribution shows a significant skew towards women, who constitute 60.28% of the sample, with men at 38.87% and a marginal 0.85% preferring not to disclose their gender. This gender imbalance could have implications for the generalizability of the study's findings, especially in terms of psychological constructs that may vary across genders. Age-wise, the sample is predominantly young, with 93.52% falling within the 18-25 age bracket. The remaining age groups (26-35 years, 36-45 years, and 46-55 years) are under-represented, which could limit the applicability of the results to a more mature audience.

The overwhelming majority of Romanian nationals in the sample (91.83%) suggest cultural factors may need to be considered when interpreting the data. In terms of educational background, the majority are in their first year of bachelor's degree programs (47.89%), followed by second year (30.14%), third year (15.49%), and master's students (6.48% combined for first and second years). This distribution indicates that the study predominantly reflects the perspectives of undergraduate students in the early stages of higher education. The employment status of the participants shows that a majority (67.04%) are not employed while the others have a full-time job (10.42%), part-time job (13.24%), self-employed (5.92%) or are employed on hourly pay (3.38%) (Table 1).

The descriptive statistic of the character traits variables indicates the highest mean value for playfulness followed by love of learning. The students' enthusiasm encountered the lowest average value (3.5387) and a very near average value had the students' courage (3.5423). The internal consistency of the variables indicates moderate reliability with Cronbach's Alpha coefficient values between 0.49-0.64. These values fall in the same interval as Bluemke et al., 2021 results (Table 2).

TABLE 2. Descriptive statistics

Variable	Mean	Std. Deviation	Cronbach's Alpha	No. of Items
Social Intelligence	3.7986	0.69700	0.493	4
Perspective	3.8394	0.70380	0.531	4
Enthusiasm	3.5387	0.77892	0.606	4
Leadership	3.6183	0.79574	0.635	4
Love of Learning	3.9063	0.73540	0.515	4
Playfulness	3.9528	0.76473	0.601	4
Courage	3.5423	0.74431	0.52	4
Valid N (listwise)	355			

Source: Authors' calculations in SPSS.

The bivariate correlations between the variables were measured. The Pearson correlation coefficients between pairs of character traits are reported, with all correlations marked with double asterisks (**) indicating a significant relationship at the 0.01 level (2-tailed). The strength of these correlations ranges from moderate to strong, suggesting that these traits do not exist in isolation. Social intelligence shows significant positive correlations with all the other traits studied. Most notably, social intelligence has a strong correlation with perspective ($r = 0.567^{**}$), indicating that socially intelligent students are likely to have a well-developed ability to understand others' viewpoints. The correlation with leadership ($r = 0.515^{**}$) also stands out, suggesting that socially intelligent students may be more inclined to take on leadership roles, possibly due to their ability to navigate social situations effectively. Leadership, a crucial trait for group dynamics and success, shows significant correlations with all other measured traits. Its strongest correlation is with perspective ($r = .548^{**}$), followed by social intelligence ($r = .515^{**}$), suggesting that effective leaders are those who are both socially aware and able to consider multiple viewpoints. Courage, a trait often associated with risk-taking and resilience, shows a strong correlation with social intelligence ($r = 0.502^{**}$) and moderate correlations with all other traits. Playfulness shows a moderate correlation with all the other traits, with the strongest being with leadership ($r = 0.415^{**}$). This interesting association suggests that a playful attitude may be beneficial in leadership scenarios, possibly by reducing stress and encouraging creative problem-solving. Love of learning demonstrates moderate correlations with all the traits, with the strongest being with perspective ($r = 0.438^{**}$). This may indicate that a love for learning can be associated with a broader view of the world and a deeper understanding of different perspectives.

TABLE 3. Bivariate Correlations

	Social Intelligence	Perspective	Enthusiasm	Leadership	Love of Learning	Playfulness	Courage
Social Intelligence	--						
Perspective	.567**	--					
Enthusiasm	.451**	.360**	--				
Leadership	.515**	.548**	.426**	--			
Love of Learning	.411**	.438**	.366**	.296**	--		
Playfulness	.415**	.368**	.372**	.415**	.304**	--	
Courage	.502**	.430**	.332**	.424**	.333**	.323**	--

** . Correlation is significant at the 0.01 level (2-tailed).

Source: Authors' calculations in SPSS.

The regression analysis further quantifies these relationships. The multiple linear regression between social intelligence and the group of perspective, enthusiasm, leadership, love of learning, playfulness, and courage indicates an almost strong correlation ($R=0.693 < 0.7$). The R Square, or coefficient of determination, is 0.48, suggesting that approximately 48% of the variance in social intelligence scores can be explained by the model. When adjusted for the number of predictors, the Adjusted R Square is slightly lower at 0.471, which is expected as it accounts for the degrees of freedom. The ANOVA results confirm the model's significance with an F-value of 53.569 and a p-value less than 0.001. The coefficients reveals that all predictors have a significant positive impact on social intelligence, with perspective having the highest impact. standardized coefficient (Beta = 0.261). The regression signals social intelligence being predicted by the following character traits, in decreasing order. Perspective with a standardized coefficient (Beta = 0.261), being a significant predictor ($p < 0.001$), plays an important role in social intelligence. Similarly, courage has a positive effect on social intelligence, with a coefficient of 0.212 ($p < 0.001$). Students who display more courage are likely to have higher social intelligence. The coefficient of 0.15 ($p = 0.001$) indicates that enthusiasm is also a positive predictor, albeit with a slightly lesser impact than perspective and courage. Leadership has a coefficient of 0.146 ($p = 0.004$), denoting its positive association with social intelligence. With a coefficient of 0.105 ($p = 0.019$), playfulness is a significant predictor, but it has a smaller effect size compared to the other traits. Lastly, love of learning has a coefficient of 0.095 ($p = 0.035$), suggesting it is the least strong predictor among those included, but still a significant one. The analysis reveals that perspective and courage are the most influential factors in predicting social intelligence among students (Table 4).

The independent samples test indicates some differences for the measured variables in terms of gender. Levene's Test results show non-significant values for most variables, indicating that the assumption of equal variances holds, allowing the use of the standard t-test for these comparisons. The mean values of variables indicate females scored higher than males except in courage.

TABLE 4. Multiple linear regression

Model Summary						
Model	R	R Square	Adjusted R Square	Std. Error of the Estimate		
1	.693a	0.48	0.471	0.50686		
ANOVA ^a						
Model		Sum of Squares	df	Mean Square	F	Sig.
1	Regression	82.572	6	13.762	53.569	<.001b
	Residual	89.402	348	0.257		
	Total	171.974	354			
Coefficients ^a						
Model		Unstandardized Coefficients		Standardized Coefficients	t	Sig.
		B	Std. Error	Beta		
1	(Constant)	0.432	0.198		2.187	0.029
	Perspective	0.259	0.05	0.261	5.174	0.000
	Courage	0.198	0.042	0.212	4.673	0.000
	Enthusiasm	0.134	0.041	0.15	3.283	0.001
	Leadership	0.128	0.044	0.146	2.913	0.004
	Playfulness	0.096	0.041	0.105	2.357	0.019
	Love of Learning	0.09	0.043	0.095	2.117	0.035

a. Dependent Variable: Social Intelligence

Source: Authors' calculations in SPSS.

The results show the highest difference in mean values for perspective (-0.27094), followed by love of learning (-0.22294). Statistically, the difference between males and females is confirmed significant (Significance < 0.05) for social intelligence, perspective, leadership, love of learning, and courage. For enthusiasm and playfulness, the difference between males and females is not significant (Significance > 0.05). (Table 5). These findings suggest that gender may play a role in the development or expression of certain psychological traits, implying that educational interventions should address these disparities to promote equality in learning opportunities.

A growing body of research underscores the significance of character strengths in fostering both academic achievement and emotional well-being among students (Gustems & Calderon, 2014). These traits are not only crucial for stimulating positive feelings but also play a pivotal role in enhancing students' performance and success. Several relevant studies' findings underlining the importance of personality traits analyzed in this research are presented as follows.

Playfulness is a positive supporter of social intelligence (Wang, 2024), by using positive humor students can develop better social relationships. Yao's (2023) study on the positive correlation

TABLE 5. Independent Samples Test.

Variables:	Levene's test for equality of variances		t-test for Equality of Means					
	F	Sig.	t	df	Significance		Mean Difference	Std. Error Difference
					One-Sided	Two-Sided		
					P	P		
Social Intelligence	0.056	0.813	-2.348	350	0.010	0.019	-0.17701	0.07540
Perspective	0.054	0.817	-3.621	350	0.000	0.000	-0.27094	0.07483
Enthusiasm	0.889	0.346	-0.242	350	0.404	0.809	-0.02049	0.08456
Leadership	0.000	0.984	-1.997	350	0.023	0.047	-0.17178	0.08602
Love of Learning	0.024	0.878	-2.813	350	0.003	0.005	-0.22294	0.07925
Playfulness	0.365	0.546	-0.610	350	0.271	0.543	-0.05103	0.08371
Courage	0.797	0.373	2.378	350	0.009	0.018	0.19201	0.08074

Source: Authors' calculations in SPSS.

between humor and interpersonal relationships of students confirmed this hypothesis. The role of humor has also proved to be important in emergencies (Belessova & Nabi, 2020). The humor in a group influences its status quo, it is part of the communicative process within the group (Lynch, 2010). Humor can be used positively or negatively by teachers. One study on students' perceptions of lecturer humor styles confirmed the positive impact of affiliative humor on students' perceptions and the negative effect of aggressive humor (James & Fox, 2024). Another study proved the mediating role of humor on social intelligence and interpersonal problems finding a positive relation between emotional clarity and affiliative and self-enhancing humor types, while interpersonal problems were negatively correlated with these humor styles, recognising the position of humor in emotional repair (유금란 & 강수정, 2016). Another study underscores the prevalent role of humor as a socially adaptive mechanism utilized by students. The students' self-reported beliefs regarding the relational and stress-relieving functions of humor point to the potential psychosocial benefits associated with humor. Students with high levels of humor revealed proper self-esteem and self-control (Artemyeva, 2017).

Wisdom or perspective could be perceived as emotional and social intelligence in practice (Boyatzis, 2007). The students' perspective level directly determines their social intelligence (Ma, Zhu, Li, Zhang, & Tian, 2022) and further the life satisfaction (Rezaei & Mousanezhad Jeddi, 2018). Wisdom was seen as one of the society pillars decades ago, in the Grec, Mesopotamian, Indian, Chinese, Islamic, and Roman cultures (Vandamme, 2023).

Students' enthusiasm plays a critical role in shaping their social intelligence and overall educational experience. A study on college students in China mentions the degree of socialist core values education enthusiasm received by students, underlining the importance of creating a good atmosphere (Ma Q., 2022). One study focused on the students' hold and catch interest in a course being affiliated with teachers' enthusiasm and peers' enthusiasm (Kim & Schallert, 2014). As enthusiasm can be contagious, teachers should consider promoting it (Moreno, 2022). One study identified the factors of low enthusiasm of students, indicating teachers' demands and parents' requirements

impact their learning enthusiasm (Gao & Fu, 2017). Academic enthusiasm has a mediating role between the moral and social atmosphere of the class and students' self-efficacy (Ali Sami Qasim Al-Obeidi, Mohajeran, & Hasani, 2024). Another study emphasizes the importance of cultivating an educational environment that effectively supports self-efficacy, finally giving rise to increased enthusiasm and vitality (Luo, Ahmadi, & Izadpanah, 2024).

Love of learning drives individuals to seek out new knowledge, explore innovative ideas, and adapt to changing circumstances (Lyons, Lyons, & Jolley, 2019). A student with a strong love of learning is inherently curious and driven to explore new concepts, which naturally leads to higher engagement and academic achievement. Similarly, social intelligence allows students to navigate social situations effectively, fostering positive relationships that can translate into collaborative learning opportunities and a supportive learning environment (Weber, Wagner, & Ruch, 2016). A study found that students with higher social intelligence demonstrated better understanding and engagement in social sciences, indicating a direct link between social skills and academic success (Moshahid & Quraishi, 2022). Social intelligence has been positively correlated with academic performance, suggesting that students who engage socially tend to achieve higher results. Engaging in academic activities promotes interpersonal intelligence, as students learn to navigate social dynamics and improve their communication skills (El-Yunusi, Abu Bakar, & Mardiyah, 2022).

The development of leadership character strength in students is closely linked to enhanced social intelligence and improved academic performance. Research indicates that leadership ability significantly influences students' academic achievements and their ability to collaborate effectively with peers (Repuela, De Los Santos, Viking, & Polinar, 2024). Students exhibiting strong leadership qualities demonstrate higher levels of collaboration and positive interactions within their groups (Hernandez, 2018). The development of leadership character traits in students can enhance social intelligence, leading to improved academic performance, as highlighted in the research on diaspora students' social intelligence (Dyussenova et al., 2023).

Courage is correlated with psychological empowerment, it is a facilitator of social engagement (Santisi, Lodi, Magnano, Zarbo, & Zammitti, 2000). Courageous students are better equipped to manage social fears and engage more fully in their social environments (Mert, Sen, & Alzghol, 2022). Courage, optimism, and vision determine the students' social intelligence (Renzulli, 2009). In the social-emotional learning curricula, courage is one of the elements considered. This underlines the importance of nurturing both courage and social intelligence to foster a classroom culture where students feel safe, nurtured, connected, and empowered (Birden, 2021). The importance of zest, love of learning, perseverance, and social intelligence were confirmed as predictors of students' success (Weber, Wagner, & Ruch, 2016). Emotions can significantly influence teacher-student interactions, which can catalyze the teaching-learning process, while curiosity and humor can develop socio-emotional intelligence (Devis-Rozental, 2018). A person's socio-emotional competencies can play a pivotal role in the attainment of their personal goals or the failure to achieve them (Goleman, 2010).

CONCLUSIONS

Contrary to the common misconception that character strengths are innate, research suggests they are malleable traits that can be cultivated and strengthened through deliberate practice and intentional development (Lyons, Lyons, & Jolley, 2019; Štrukelj, Zlatanović, Nikolić, & Zabukovšek, 2019). Individuals are born with a natural inclination toward curiosity (Raine & Pandya, 2019),

which serves as a foundational element for the love of learning (Bayar, Sart, Gavriletea, & Coroş, 2022; van der Westhuizen, 2023), Students cultivating virtues such as perspective, enthusiasm, leadership, courage, love of learning, and playfulness are better equipped to cope with stress and adversity, enhancing their personal growth and adaptation to challenging situations. The research is increasingly recognizing the importance of character strengths such as zest, love of learning, perseverance, and social intelligence in students' academic achievement and emotional well-being. These traits are not only crucial for fostering positive feelings but also play a pivotal role in enhancing students' performance (Weber, Wagner, & Ruch, 2016).

Socio-emotional intelligence is a vital aspect of human functioning that encompasses the skills necessary for managing emotions and navigating social interactions. Its importance cannot be overstated, as it impacts not only individual well-being, health (Zeidner, Matthews, & Roberts, 2011) but also the dynamics within groups and organizations. As society continues to recognize the value of these skills, the cultivation of socio-emotional intelligence will likely become an increasingly important goal for educational and professional development programs. Encouraging social intelligence in students may lead them to learn to strengthen themselves, stay focused, and perform well without being disrupted by emotions (Fato, 2024). Students' ability to manage their emotions and social dimensions is key to their well-being, happiness, and empowerment. Emotional and social intelligence are integral components of learning communities, where students can thrive in an environment that supports personal progression and positive socialization. Additionally, social and emotional competencies are critical for students' development and are closely linked to student engagement and overall well-being (Gustems & Calderon, 2014).

This study underlined the significance of social intelligence and supportive personality traits in fostering positive behavior. By understanding and cultivating these traits, individuals can better adapt to their environment and promote harmonious societal relationships. The correlation between measured character traits and social intelligence is a substantial finding that has practical implications for educational institutions. Universities should consider integrating social intelligence development into their curricula and support services to foster students' interpersonal relationships and collective well-being. By strategic incorporation of humor-based interventions, leadership supports courage reinforcements, love of learning stimulations, perspective developments, and enthusiastically implicating students, the education body will enforce more sustainable education and society.

The gender differences observed suggest that educational interventions may need to be tailored to address the specific needs and strengths of male and female students. Moreover, the cultural homogeneity of the sample indicates that further research with a more diverse population is necessary to understand the universality of these findings. Future research should aim to address the limitations of this study, such as the underrepresentation of certain demographics, to ensure a more comprehensive understanding of student personality traits across diverse populations.

This research has some limitations. Focusing mainly on perspective, love of learning, leadership, courage, enthusiasm, humor, and leadership, there may be other factors influencing social intelligence, as the results indicate. The generalizability of the results is limited due to the nationality of respondents. Replication studies in different countries and universities improve the ability to generalize the outcomes to diverse cultures and contexts.

In conclusion, this study emphasizes the need for educational institutions to cultivate character traits in students, despite the studying field, suggesting that personality development is a synergistic

process. These insights could be instrumental in shaping educational practices and student support services, ultimately contributing to the development of young individuals. The implications of these findings could be far-reaching, impacting educational strategies, leadership training, and personal development programs. Educational institutions and psychologists might consider these findings when developing curricula and interventions to foster well-being and social values among students.

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La influencia de las características interculturales y psicológicas de los participantes en la negociación en el estilo de comunicación y la toma de decisiones (estudios de casos de procesos de negociación)

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Resumen. El artículo profundiza en la persistente presencia e influencia de las características psicológicas interculturales y su efecto en la negociación intercultural. Las relaciones interpersonales y la confianza desempeñan un papel crucial en las negociaciones interculturales. El nivel de confianza, compenetración y respeto dentro de una negociación está muy influido por los antecedentes culturales, lo que a su vez afecta a la disposición a hacer concesiones y encontrar soluciones mutuamente beneficiosas. El objetivo es establecer los mecanismos de evaluación de las características psicológicas interculturales de la negociación dentro del contexto prospectivo oriental. Los métodos analíticos, metódico y de clasificación sirvieron de base a la investigación y permitieron alcanzar el objetivo especificado. Los resultados incluyen las estrategias formuladas para una comunicación eficaz utilizando características psicológicas en el contexto de la negociación intercultural y un conjunto de estudios de casos de características psicológicas de las negociaciones. Las futuras investigaciones sobre el

tema podrían centrarse en determinar los escenarios de las características psicológicas interculturales de la negociación en el contexto prospectivo oriental y en la creación de nuevos modelos interculturales de cooperación con los países del Este.

Palabras clave: comunicación intercultural, características psicológicas, negociación, contexto oriental, comunicación de alto contexto.

The influence of intercultural and psychological features of negotiation participants on communication style and decision-making (case studies of negotiation processes)

Abstract. The article delves into the persistent presence and influence of intercultural psychological characteristics and their effect on intercultural negotiation. Interpersonal relationships and trust play a crucial role in cross-cultural negotiations. The level of trust, rapport and respect within a negotiation is strongly influenced by cultural background, which in turn affects the willingness to make concessions and find mutually beneficial solutions. The objective is to establish the mechanisms for evaluating the intercultural psychological characteristics of negotiation within the prospective Eastern context. Analytical, methodical and classification methods served as the basis for the research and made it possible to achieve the specified objective. The results include strategies formulated for effective communication using psychological characteristics in the context of cross-cultural negotiation and a set of case studies of psychological characteristics of negotiations. Future research on the subject could focus on determining the scenarios of the intercultural psychological characteristics of negotiation in the prospective Eastern context and on the creation of new intercultural models of cooperation with Eastern countries.

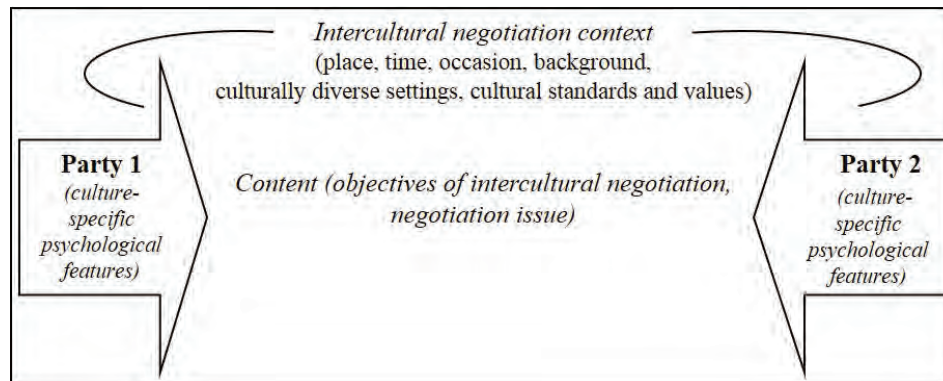
Key words: intercultural communication, psychological features, negotiation, Eastern context, high-context communication.

INTRODUCTION

The process of negotiation requires comprehension and management of psychological distinctions and dynamics that emerge when individuals from diverse cultures interact. Previous research in the field of intercultural psychological features is concerned with cultural diversity's effects on negotiation procedures and findings, aiming to determine how differences in cultural norms, values, and cognitive perspectives affect negotiation behaviour and results. This study aims not only to compare and contrast psychological characteristics, behaviours, and attitudes across various cultures in order to comprehend both the differences and similarities of human psychology in an intercultural context, but also to explore the impact of cultural factors on individual and collective psychological processes, examining how cultural values, norms, and practices shape the development of psychological traits and influence cognitive and emotional processes across diverse cultural contexts and designing the mechanisms of cooperation with the Eastern countries. By doing so, it aims to foster greater understanding and empathy between people from different cultural backgrounds.

The architecture of intercultural negotiation could be presented as shown at Picture 1.

In the conditions of the new digital paradigm, which largely determines the life orbit of young generations, it is necessary and important to study the whole range of online activity practices of young people (Eflova et al., 2023). The search for an answer to the question of what practical actions should be taken in order to strengthen the role of the digital environment in the formation of positive behavioral practices of young people and to neutralize and exclude the formation of their negative forms is relevant. In this regard, it is relevant to study the dynamics of changes in the digital behavioral trends of young people and identify their main directions.



In line with the main aim, this paper has the following objectives: to analyse the phenomenon of intercultural negotiation; to understand how cultural peculiarities are influencing negotiation styles; to apply theory-based psychological frameworks to real-life intercultural negotiation scenarios; to develop psychological strategies for effective negotiation in culturally diverse settings.

In «Results» section the authors explore the complexities and nuances of negotiating across different cultures, shedding light on the various cultural factors that come into play. From communication styles to decision-making processes and the impact of values and traditions, we will delve into the key considerations for effectively navigating intercultural negotiations. This section aims to establish a comprehensive theoretical groundwork for the discourse around psychological features of negotiation, illustrating how they form, persist, and complicate intercultural dialogue.

In the «Discussion» section, the paper transitions to proposing practical suggestions and strategies on the consideration of intercultural psychological features of negotiation. A dedicated case study offers empirical data and real-world insights, serving as a critical reflective tool for understanding the multi-faceted nature of intercultural psychological features of negotiation.

METHODS

Firstly, *the analytical method* will be used, which involves the analysis of existing research articles, books, journals and other sources in order to gain a clear understanding of the research topic, as well as knowledge of the main theoretical approaches and concepts related to the topic. Furthermore, the investigation employs a *methodical approach* to compare and contrast different cultural negotiation styles, approaches, and values to identify commonalities and differences. Additionally, a *classification method* will be implemented to systematically organise and structure diverse variations of psychological features, providing insight into their nature, origins, and mechanisms of operation. The practical element of the programme predominantly utilises *case study* methodology, facilitating

examination of genuine interethnic conflict examples and intercultural negotiation issues. This approach skilfully demonstrates the impact of intercultural aspect of psychology in negotiation across diverse sectors and presents pragmatic suggestions to alleviate such partialities, underpinned by detailed explanations of the suggested strategies.

LITERATURE REVIEW

The peculiarities of intercultural communication. In order to grasp the notion of psychological features of this aspect fully, it is imperative to begin with intercultural negotiation and emphasise its critical characteristics. Negotiation is a crucial form of interpersonal interaction in any context since it enables individuals to manage conflict and accomplish their objectives. Despite the universal interest in studying negotiation, there has been an emphasis on investigating the cognitive and rational facets of the negotiation process, with little attention paid to its emotional aspects. However, in recent years, there has been an increasing recognition that emotions have a significant impact on negotiations. As a result, studying emotions in negotiations has gained popularity among academics and researchers.

Referring to the work on the social psychology of negotiation, which was written by J. Z. Rubin & B. R. Brown in 1975 (1975, pp. 110-150) subsequent criteria are the main ones in order for the situation to be a negotiation: the presence of two or more people; the presence of a conflict of interest; the negotiators are voluntarily involved in the conversation; these connections affect the search for a conclusion and resolution of the situation regarding a specific issue between people, as well as the interchange of existing knowledge of the participants; the requirements for negotiation, which are presented by each of the parties, also play a key role in finding mutual understanding and final agreement. In the publication, the authors introduced the term “intercultural negotiation” and stated that negotiations are the best option to resolve the conflict. This article also presents a valuable contribution of other scientists who fully help to understand the problem of comprehending intercultural negotiations, for example, in the article of Interpersonal Relations of S. S. Komorita & C. D. Parks (1995, pp. 183–207), the writers identify several types of negotiations – conflict management or transactional negotiations. Interactions and disputes can range from basic daily encounters and misunderstandings to intricate organizational predicaments, legal conflicts or even those significant enough to instigate wars. They can occur between only two individuals debating one topic, or they may encompass multiple subject matters, various parties or numerous individuals speaking on behalf of a particular constituency. They can be brief or enduring and can transpire via virtual or in-person communication. Regardless of the nature of negotiations, they all share a common aim: for the involved parties to collaborate in order to prevent a deadlock and achieve a mutual agreement, while also striving to compete to attain the best possible outcome.

All these subtleties are very important for the negotiation process. L. Thompson (1990, pp. 515–532) in his work about negotiation and behavior and D. Pruitt, & J. Rubin in the article about social conflicts (1986, pp. 86-97), immersed in the issue of the structure of negotiations. The process depends on the degree of conflict that exists between parties’ interests. Pure conflict, also known as fixed-sum or win-lose or value claiming or purely distributive bargaining, refers to situations where parties’ interests are conflicting and perfectly negatively correlated and thus bargainers’ primary motivation is to maximize their utility or their share of fixed-sum payoffs. At the opposite end, there are pure coordination situations that describe negotiations where bargainers’ interests are very compatible.

Regarding the issue of the outcome of the negotiations, L. Thompson highlighted several standard situations. Integrative negotiation agreement is considered efficient and Pareto (1935) optimal if it fulfills the requirements of all participating parties without causing any harm to them and if there are no better alternatives that could serve the interests of one or both parties. Speaking about the distributive negotiation agreement, it refers to the process by which individuals decide how to distribute resources and can be better comprehended via the traditional ultimatum game. This is an experiment in which the proposer, a player, is presented with a fixed sum of money and has the chance to divide it with another player, the responder, who can either accept or reject the offer if it is deemed unfair. In the first scenario, neither player receives any payment. However, if the responder agrees to the proposal, the sum of money is distributed based on the proposal, and the distributive aspect of the bargaining process indicates the percentage of the initial amount that each negotiator will receive. Negotiations can lead to economic and socio-psychological outcomes. Socio-psychological results from negotiations include negotiators' satisfaction and the relationship between parties, as well as their willingness to engage in future negotiations with the same opponent. The subjective value (Curhan, 2007) of negotiators is one of the most commonly researched socio-psychological outcomes of negotiations.

Some academic disciplines, including sociology, cognitive psychology, and political science, have significantly influenced the study of negotiations. This has resulted in the consensus that this field is one of the most challenging. The work of D. Druckman (1977), which is related to the topic of social-psychological perspectives, depicts that negotiation process primarily centers on two research areas: a) differences among negotiators in terms of individual factors such as demographics (e.g. gender) and personality traits, and b) coincidental characteristics (e.g. power). While gender remains a topic of controversy, with conflicting evidence on its impact, culture has emerged as a more substantial element. Women frequently encounter challenges due to societal expectations, facing a predicament between conforming to gender stereotypes and adopting a more effective, assertive approach. Backlash effects and societal pressure complicate negotiators' strategies. However, studies suggest that gender may not have a significant impact on negotiation competitiveness. Limited insight has been found in predicting negotiator performance through individual characteristics, including cognitive abilities, which have also been questioned regarding their practical implications. Cultural differences have been identified as having a more prominent effect on negotiation outcomes. Acknowledging and understanding such differences can enable negotiators to develop appropriate strategies. Thus, whilst individual differences may not strongly predict bargaining performance, cultural nuances are deemed to play a significant role in negotiations. Regarding contextual features, social psychological research examined these factors in negotiation, including communication, payoffs, deadlines, and negotiator power. Power, sourced from coercive, reward, legitimate, expert, and referent power were central topics. The Best Alternative to a Negotiated Agreement (BATNA) was viewed as a primary source of power, affecting negotiators' reliance on opponents and their success in achieving desired outcomes. As negotiation research decreased in the late 1970s as a result of the social cognitive movement, scholars from management schools began to utilize behavioural decision research (BDR) to inform negotiation theory. The emphasis was on the significance of decision-making in circumstances that are outside the control of negotiators.

Thus, the evidence suggests that positive emotions offer various advantages to the participants of transactions, whereas negative or neutral feelings generally result in significant negative outcomes. However, the current study uncovers inconsistencies within the conclusions, explicable

by the topic's complexity and the multitude of relevant factors. Moreover, the investigation of emotions in negotiations remains nascent, necessitating further research. The growing fascination with emotional dynamics in negotiations in recent times possibly links to the emergence of positive psychology as a new field of study within psychology during this period. Positive psychology, which conducts scientific research on positive emotions, has aided comprehension of how positivity can enhance outcomes across various aspects of life.

Recent research has investigated the questions of predictability and anxiety on willingness to interact with a person from another cultural group (Logan et al., 2017). This research group argues upon the fact that Asian people are more apt to seek psychological support (authoritative people, colleagues, friends, religious community) while involved in intercultural negotiation. Such characteristics as higher anxiety, uncertainty, ethnocentrism and help-seeking are more applicable to Asian people due to the peculiarities of their acculturation.

Asian negotiators prefer to save face and ignore conflicts as well as use tactics leading to desired outcomes that meet the interests of the collective. The negotiating parties may start their communication with two different motivations: claiming value and creating value. In this case, negotiation could be regarded as a process of cooperation and competition. Intercultural negotiation within the Eastern context is complex and challenging because of the cultural singularity. M. Benoliel (2013) describes it as unstated, implicit, and internalized in subtle behavioral patterns.

Yu. Long and Q. Lei (2022) discuss the psychological features of Eastern negotiators within the framework of high-context communication. They give a list of these psychological features: group-oriented values of communication, mutual-face concern, spiral logic, indirect style of negotiation, status-oriented style, self-effacement style, listener-oriented style, context-based understanding (Long & Lei, 2022).

Psychological Features in Intercultural Negotiation

Psychology has a crucial function in intercultural negotiation, as it involves comprehending diverse cultural values, communication styles, and views on power and hierarchy. These aspects have a direct impact on the negotiation dynamics and can considerably affect the outcomes. Thus, it is essential to grasp psychological underpinnings of intercultural negotiation for successful cross-cultural interactions.

Negotiation arises from the dynamics of social interaction, making theoretical frameworks focused on the social aspect crucial when analysing how emotions are involved in negotiation. Psychosocial theories, for instance R.S. Lazarus's (1991), provide valuable insight into the intricate linkages between emotions, cognition, and social exchange, by clarifying how emotions influence interaction and affect people's understanding and evaluation of social encounters. Moreover, these theories highlight the emergence of emotions as a consequence of social interactions. Social constructivist models, endorsed by scholars such as J. R. Averill (1980), operate under the assumption that emotions are best understood within the context of the social environment, surpassing the idea of emotions as mere psychological responses. Instead, emotions are perceived as interpretive constructs that are influenced by culture, language, and social learning. They serve as a means for individuals to derive meaning from their social environment.

E. J. Lawler and J. Yoon (1995) proposed that affective commitment to a relationship is formed through the emotional implications of repeated negotiations between the same parties. Based on

the assumption that interdependence fosters a need for recurrent negotiations, Lawler and Yoon argued that frequent agreements between the same parties generate mild positive emotions, which leads to the establishment of dyadic relationships. Negotiators start to attribute their feelings of control and associated positive emotions, partly to their relationship following Lawler and Yoon's expression (p. 155). The process ultimately leads to the establishment of affective commitment, creating the basis for subsequent interactions. Additionally, B. Barry & R. L. Oliver (1996) offered a broader perspective, highlighting the emotional states that carry importance at different stages of a negotiation encounter. Firstly, the authors identified anticipatory emotional states, suggesting that they arise from the bargaining environment, past interactions within the dyad, and the negotiators' dispositional affect. Secondly, they argued that the emotions experienced during negotiations stem from initial offers, concessions, and other tactical behaviours, which lead to adjustments in aspirations and expectations and thus influence tactical conduct. Lastly, the model investigates the impact of post-negotiation affect resulting from particular bargaining outcomes and how parties attribute those outcomes. Post-negotiation affect is believed to influence future interaction and subsequent behaviour, including the parties' efficiency in implementing the negotiated settlement.

Overall, the majority of the reviewed conceptual works present formal models that can be tested empirically through specific predictions. Though all of these models acknowledge that emotion is an outcome of bargaining, only one places significant emphasis on it. The remaining models emphasise the unfolding of emotions or their strategic regulation within the encounter. Together, these models do not directly compete with each other, but instead provide complementary frameworks that tackle different aspects of the negotiation process from various perspectives.

Approaches that focus on the social aspects of emotion are vital in understanding the impact of emotions on negotiation. Our perspective is that these approaches are interconnected with the study of individual differences, as opposed to being separate from it. Research further demonstrates that differences in people's motivational tendencies significantly affect how mood influences the cognitive aspects of negotiation. A thorough comprehension of the function of emotions in negotiations necessitates an assessment of the variations in emotional experiences and expressions during continuous social interactions among individuals. Several stable individual difference variables that have been associated with emotional experience or expression are of potential relevance for analysing emotions in negotiations. These individual differences comprise emotional expressivity, self-monitoring, and the "Big Five" personality dimensions (McCrae & John, 1992); the relatively new field of emotional intelligence; and gender-related emotional differentiation. *Emotional expressivity* is frequently conceptualized as a consistent dispositional trait that comprises multiple facets, including impulse strength, negative expressivity, positive expressivity, expressive confidence, and emotion masking. These facets are associated with positive and negative emotions and several of the Big Five personality dimensions investigated the circumstances in which emotional experience is reflected in emotional expression. Their study indicated that highly expressive individuals exhibit expression for both positive and negative emotions, whereas low-expressivity individuals only express positive emotional experiences. The dispositional trait of *self-monitoring* offers additional insight into the function of emotional expression in negotiation. People with high self-monitoring show greater proficiency in communicating emotions, both verbally and through facial expressions, than those with low self-monitoring. In a set of studies, R. E. Lucas (2001) discovered that extroverts were inclined towards recollection of positive words and positive judgments, whereas those high in neuroticism demonstrated a greater recollection of negative words and made more negative overall judgments.

The study by Van Kleef, De Dreu, and Manstead (2001) investigated the interpersonal effects of emotions during negotiation and found that participants faced with an angry opponent tended to make lower demands and concede more than those negotiating with a happy or non-emotional opponent. The research conducted by Van Kleef et al. supports the social functions perspective and shows that anger facilitates collaboration, whereas happiness encourages competition. These findings disclose novel understandings of the impact of positive and negative emotions on negotiation outcomes. Antecedently, it was generally accepted that positive emotions increase negotiator efficacy, while negative emotions reduce it. However, this belief was predominantly grounded in the intrapersonal consequences of emotions, whereas Van Kleef and colleagues' study implies the need for a more nuanced understanding. Their investigation into the interpersonal effects of emotions uncovered that negative emotions may prove more advantageous than positive emotions in negotiation situations. Although seemingly paradoxical, this is not invariably the case. Previous research on intrapersonal effects has mainly focused on integrative negotiation tasks, demonstrating the advantages of positive emotions and the disadvantages of negative emotions. However, Van Kleef et al. examined a distributive negotiation task which revealed anger to be more "effective" than happiness. Therefore, it seems that anger is more advantageous when claiming value in distributive negotiations, while happiness may be more beneficial in integrative negotiations.

The significant dependency on simulations of mixed-motive bargaining in negotiation research leads to questioning the portrayal of genuine emotions in the social interactions being analysed. While individuals involved in experimental setups may experience some mild positive and negative emotions, the actual breadth of emotions felt during real negotiations, such as anger, delight, anxiety, and frustration, could be influenced by personal stakes or contextualized social relationships, which cannot be easily replicated in laboratory or classroom scenarios. Real-world negotiations frequently involve substantial interpersonal relationships, high monetary stakes, and life-altering events, among other factors which are hard to recreate in simulated settings. As a result, the generalizability of laboratory studies examining negotiators' emotional state is doubtful, mainly since the range of topics that can be simulated is limited. While experiments and simulations are valuable tools for comprehending information processing during negotiations, they may not wholly encompass the significance of norms, values, morals, emotions, relationships, power structures, and other pivotal factors for understanding conflict and its progression. It is crucial to use a multifaceted approach to gain a thorough understanding of negotiation and conflict processes.

Essential results of the previous studies which draw the relationship between cultural dimensions and psychological features: frequent agreements between the same parties generate mild positive emotions, which lead to the establishment of dyadic relationships; emotions can serve as motivations or hindrances to behavior, controlling social interaction and directing cognitive or behavioral adaptation; positive emotions increase negotiator efficacy, while negative emotions reduce it.

The following psychological features have been identified as general for any type of negotiation process: emotional expressivity; self-monitoring; "Big Five" personality dimensions (McCrae and John, 1992); the relatively new field of emotional intelligence; gender-related emotional differentiation.

Psychological aspect tends to become crucial in intercultural negotiation as it allows taking into consideration certain ethnic tactics of communication, thinking patterns, attitudes to time or risks, preferences in individual or collective behaviour, etc.

Outlining the way to negotiate with Eastern partners, it's necessary to bear in mind that they are known to be masters of negotiation. A lot has been written of how to communicate with Eastern negotiators but the problem lies in the fact that most of the studies were undertaken by representatives of western cultures and the results are presented through western culture lenses.

M. Svetlicic underlines the ambivalent position of Eastern negotiators towards foreigners. In the process of negotiation one may communicate with “the Maoist bureaucrat, Confucian gentlemen and Sun Tzu strategist” at the same time. The collective nature of Asian society is consistent with Asians' broad, contextual view of the world and their belief that events are highly complex and determined by many factors and all these factors are influencing on the process of negotiation (Svetličič, 2022).

The main psychological focus in negotiations with Eastern partners is determined by principles: courtesy and loyalty, harmony, keeping up appearance “no matter what”, humility and respect for age and rank. Relationships are more important and have long-term perspective than the results of momentary interaction.

DISCUSSION

Strategies for effective communication using psychological features in the context of intercultural negotiation

The preceding section examines common forms of psychological features, concentrating on how they emerge in the context of intercultural negotiation. Research has revealed that successful and cooperative negotiators have the following abilities and characteristics (Rubin & Brown, 1975): *controlled risk behaviour, ability to perceive and judge events in their complexity, ambiguity tolerance, and positive self-image, cooperative and nonauthoritarian attitude.*

The function of psychological features in intercultural negotiation is a crucial aspect of effective communication and successful resolution of conflicts. In cross-cultural interactions, individuals bring their unique cultural background, values, and behavior patterns to the negotiation table. Understanding the psychological nuances at play in these interactions can greatly affect the outcome of the negotiation process.

Intercultural negotiation at an academic level entails a multifaceted interaction of psychological factors that affect the dynamics of the negotiation process. A comprehensive understanding of these factors is vital for effectively managing the intricacies of cross-cultural communication and collaboration within an academic context. The negotiation process consists of three phases, which may differ in interpretation and approach based on cultural disparities.

In this context, several approaches can be suggested. The primary approach is to *Establish Communication and Form a Relationship*. The initial contact and the desire to commence negotiations are pivotal as they serve to lay the groundwork for a careful evaluation of market conditions and the identification of viable negotiation partners. Diverse cultural perspectives meaningfully impact this phase. In Western cultures, selecting appropriate negotiation partners is determined by factors such as competence, cost-effectiveness, and quality. However, in collectivist cultures like those found in various Asian countries, partners may be chosen based on existing mutual obligations, despite the availability of more attractive alternatives. After initial contact has been made, it becomes imperative

for both parties to establish a foundation of mutual trust. This is pivotal for successful negotiations, as the absence of such trust can lead to competition, deception, and manoeuvring. Additionally, differing cultures display a range of trust-building and trust-maintaining behaviours and symbols. In cultures that place a high value on personal relationships (Thomas et al., 1998), including those in Arab countries or Latin America, it can be crucial to establish a connection with the negotiator as an individual, in addition to their corporate role. This may involve engaging in seemingly irrelevant personal conversations, which, whilst not customary in other cultures, can play a central role in building the trust necessary for successful negotiations. Individuals from task-oriented cultures, such as Germany, may find it difficult to navigate initial contact protocols and establish mutual rapport. This is due to the lesser emphasis on interpersonal etiquette in such cultures.

Negotiating and reaching agreements entail several rounds of discussions, encompassing proposing, agreeing or disagreeing, engaging in conversation, and summarizing agreements. The cultural subtleties of presenting proposals and advocating for one's interests, as well as negotiating, and non-verbal communication, are crucial during the process. These cultural factors impact the range between the highest and lowest demands in a negotiation which is essential for reaching an agreement, and also affect the exchange of offers and counteroffers. German negotiators are often perceived as inflexible due to their narrow negotiation range, leading to hitting the pain threshold after just a few negotiation rounds.

To develop a deeper insight into a foreign culture and its inhabitants, *one should pursue in-depth examination and exploration*. This may include submerging oneself within the culture's customs, traditions, language, and history. It is also beneficial to engage in dialogue with members of the culture and to pursue educational resources for further understanding. Additional approaches may involve examining cultural customs and communication styles, as well as exploring the values, beliefs, and societal norms that shape the viewpoint of the given culture.

To create an appropriate negotiating plan, it is imperative to first establish and cultivate relationships with the other culture whilst respecting cultural norms of both parties. This necessitates understanding communication styles, decision-making processes, and rapport-building methods of the other culture. To commence negotiations, we can arrange informal meetings or social events to begin building rapport and trust. We should consider the preferred forms and formats for interaction of the other culture, and aim to comply with their negotiation protocols in a way that is comfortable for all parties involved. After establishing initial relationships, we can proceed to address substantive issues by organizing formal negotiation sessions. These sessions allow for information exchanges and mutual education, ensuring that both parties thoroughly understand each other's perspectives and needs. If the other party adopts a positional approach or makes demands, we can reframe the conversation to encourage an interest-based approach. This involves prioritising underlying interests and shared goals over positions.

It is equally important to analyze and interpret the factors affecting the situation at hand and devise an appropriate response. Upon identifying cultural diversity hindering the advancement of negotiations, strive to comprehend the underlying rationale for their conduct or perspectives. Take advantage of prior investigations and interactions to elucidate the circumstances, establish a theory concerning the reasons and feasible consequences of the opinions, attitudes, and actions displayed. Choose a course of action and devise at least two tactics to contemplate executing when dealing with cross-cultural negotiations.

This section identified some strategies for managing cross-cultural negotiations using psychological features. These techniques are contingent on your willingness or ability to adjust to the other party's culture, as well as their corresponding willingness or ability to adjust to yours. The choices are: *adherence; avoidance and contention; adaptation; adoption; and advancement.*

The aforementioned strategies emphasise the significance of attending to the psychological aspects that pertain to negotiation. Such considerations either facilitate or impede the participants' ability to attain the desired outcome in the form of gaining valuable benefits and experiences.

Therefore, the following tools for strategies can be identified: *controlled risk behaviour, ability to perceive and judge events in their complexity, ambiguity tolerance, positive self-image, cooperative and nonauthoritarian attitude.* Additionally, it is worth mentioning actual strategies that can be often used: *establishing communication and forming a relationship, negotiating and reaching agreements, pursuing in-depth examination and exploration in cultures and traditions and creating an appropriate negotiating plan.*

For instance, Chinese style of negotiation displays collective spirit and demonstrates very polite and indirect communication strategy. Flattering and ambiguous expressions are considered normal in the process of negotiation. The Chinese don't rely on words; their sentences are short meanwhile they pay more attention to posture, expression and tone of voice. The Chinese avoid saying "No" at all costs because it could insult the other party, or embarrass someone. At the same time, "Yes" could mean disagreement. It is recommended to ask the same questions several times while negotiating with the Chinese so that to fix on the real point. During negotiation be ready to talk simultaneously on different issues and in a chaotic manner. One may use such tools as smile or silence bringing them ahead as welcoming techniques to come to terms with the Chinese partners. For Chinese negotiator silence is time for reflection. Showing sincere respect and interest for local Chinese culture will help one avoid mistakes in negotiation (Svetličič, 2022).

Case study of psychological features of negotiations

The case section of the paper serves as a critical component in applying theoretical knowledge to real-world situations. This segment provides students with the opportunity to analyse and evaluate complex scenarios, often rooted in authentic business, legal, or ethical dilemmas. Through the examination of these cases, students can develop practical problem-solving skills, enhance their critical thinking abilities, and gain valuable insights into the application of course concepts in various professional contexts. Each case study is situated within a distinct context: educational establishments, corporate settings.

Case Study No. 1 illustrates the differences in cultural characteristics, due to which employees who have just got a job in another country may suffer because of the psychological features of doing business and negotiations. Thus, negotiation is a crucial global strategy. Leaders who fail to follow intercultural psychological negotiation styles and strategies experience difficulty in establishing rapport with their employees and management. This challenge is more prevalent for relocated workers. Active listening, open communication, trust building and demonstrating respect are essential elements of building a relationship. They indicate that you appreciate their input and are interested in hearing what they have to say. Thus, the strategy of *establishing communication and forming a relationship* is applicable in the 1st case. In summary, effective communication, empathy, trust, and respect are fundamental aspects of building and maintaining robust relationships.

Case Study No. 2 is about negotiators who belong to high power distance cultures and tend to adhere to hierarchical decision-making structures, while their counterparts from low power distance cultures may pursue more egalitarian approaches. Consequently, this could potentially result in various misunderstandings, conflicts and, ultimately, failed negotiations. The case illustrates the challenges and importance of intercultural negotiation dynamics in the tourism industry. However, the strategy of *pursuing in-depth examination and exploration in cultures and traditions of another country* is vital to reach an agreement or find a compromise. This strategy includes: cultural immersion pre-supposing spending a significant amount of time living and interacting with the local population to gain a deep understanding of their customs, traditions, and way of life.

Case Study No. 1. The role of culture in intercultural psychological negotiating styles using the strategy of establishing communication and forming a relationship

General problem formulation. The global conditions of negotiation can also be characterized as a global strategy – one that is foundational. Observations show that leaders who do not follow intercultural psychological negotiating styles and strategies are unable to establish a connection with their subordinates and management. This problem is particularly noticeable among employees who have been transferred from one country to another. Questions arise as to the importance of similar cultural features in the workplace, the possibility of working in a foreign country without changing one's habits and traditions, and how different the psychological negotiating styles are in different countries.

Key task. Propose possible ways to address the cultural and habit differences of employees based on psychological factors.

Context for solving the task. Paulo works in an international firm and was recently transferred from Italy to Japan, which was quite a stressful situation for him. Italy represents a polychronic culture, where people live by polychronic time, juggle multiple tasks simultaneously, and cannot adhere to a schedule. Conversely, Japan is a country with a monochronic culture. The Japanese work diligently and meticulously fulfil their duties. After living for so many years in a country where interpersonal human relationships play a significant role, and communication with people is more important than an accepted plan of action, Paulo was extremely surprised to find that in Japan, being late and leaving work early is prohibited. Unfortunately, this led to mental problems for him as he struggled to find like-minded individuals and close friends, feeling completely alone in a foreign country. This state led to emotional burnout and a lack of motivation to work.

Tasks that could lead to a solution.

- 1) To determine which strategies and action plans will help to adapt quickly and understand a different mentality.
- 2) To develop an additional sense of understanding that another person has grown up in a different environment, has different habits, and may not understand our intentions or expectations.
- 3) To conduct a thorough analysis and study the rules that exist in Japan.
- 4) To forecast the possible outcomes if the chosen recommendations are followed, and how this will help find the best solution.
- 5) To conduct a survey among local residents, employees, and colleagues who can help in the difficult situation of adapting to foreign traditions.

The purpose of this case is to consider the difficulties that workers may encounter when operating in foreign nations due to cultural and habitual disparities, particularly emphasising the psychological aspects of negotiation styles. The specific scenario concerns an individual named Paulo, who experienced a significant amount of stress and mental health problems due to disparities between Italian and Japanese cultures after being transferred to work in Japan. The aim of the first case is to propose possible ways to address these cultural and habit differences of employees based on psychological factors. To efficiently adjust to a different mind-set, it is vital to comprehend and implement appropriate measures such as empathy and awareness towards individuals with diverse cultural backgrounds, conducting meticulous evaluations of the regulations in the host nation, prediction of the potential impacts of the preferred suggestions, and gathering feedback from neighbours, colleagues, and staff to facilitate the adaptation to foreign traditions.

Case Study No. 2: Cross-cultural negotiations: the impact of power distance on decision making using the strategy of pursuing in-depth examination and exploration in cultures and traditions of another country

General Problem Formulation: In the global business landscape, the nuances of cross-cultural negotiations become crucial for successful partnerships and collaborations. One of the central challenges is the varying power distance among different cultures and how it affects decision-making processes. It is observed that negotiators from high power distance cultures tend to follow hierarchical decision-making structures, while those from low power distance cultures may adopt more egalitarian approaches. This can lead to misunderstandings, conflicts, and failed negotiations.

Key Task: Explore the influence of power distance on negotiation styles and develop strategies to effectively bridge the gap in decision making.

Context for Solving the Task: Maria, an executive from Brazil, is leading negotiations with a team from Sweden. Brazil is known for its high power distance culture where individuals expect clear hierarchies and centralized decision-making, while Sweden embodies low power distance, promoting more democratic and inclusive decision-making processes. As a result, the negotiation process becomes strained due to conflicting approaches to reaching consensus, leading to potential breakdowns in the partnership.

Tasks Leading to a Solution:

- 1) To analyze the cultural dimensions and their impact on decision-making styles in Brazil and Sweden.
- 2) To conduct a comparative analysis of negotiation strategies employed in high and low power distance cultures.
- 3) To develop a negotiation framework that accommodates both hierarchical and egalitarian decision-making preferences.
- 4) To implement cross-cultural training for the negotiation teams to raise awareness and bridge the understanding gap.
- 5) To assess the potential benefits and challenges of integrating diverse decision-making approaches and strategize for a mutually acceptable negotiation process.

The aim of the second case is to tackle the difficulties that arise from different cultures' varying power distance and its influence on decision-making in cross-cultural negotiations. The defined ob-

jectives entail gaining comprehension of the cultural dimensions in Brazil and Sweden, performing a comparative analysis of negotiation methods in high and low power distance cultures, creating a negotiation framework that caters to hierarchical and egalitarian decision-making preferences, instituting cross-cultural training to bridge the knowledge divide, and evaluating the advantages and obstacles of incorporating several decision-making approaches to reach an agreement. Additionally, speaking about other possible strategies, *Negotiation Framework Development* used to develop a negotiation framework that accommodates both hierarchical and egalitarian decision-making preferences is crucial. This framework should outline a flexible approach that acknowledges and respects the different cultural tendencies while aiming to achieve consensus and mutual understanding.

Overall, these two cases show us what the intercultural aspect is from the practical point of view. When comparing both of them, it is evident that the negotiation strategies employed have a significant influence on the outcome, whether positive or negative.

Negotiations with Eastern partners are long-term oriented and considered to be an investment of time and energy in relationship-building. Speed is thought to be impolite, dangerous and cunning in interactions; it creates chaos and a mess. Eastern partners prefer to reach agreements at the very last moment of a negotiation or even after a deadline.

As a result of the study presented in this paper, two possible negotiation scenarios with Eastern partners could be given (Table 1).

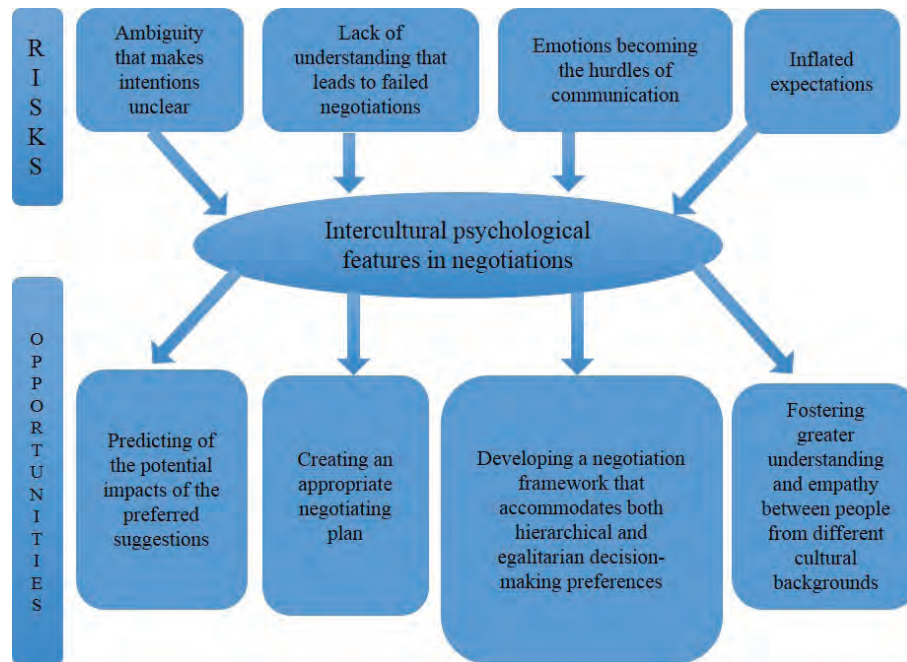
TABLE 1. Possible negotiation scenarios with Eastern partners

Negotiation scenario	Strategy used in negotiation	What does it mean?
trust is high and a 'win-win approach' to the negotiations is displayed	a cooperation strategy is used	they expect and seek long-term relationships
trust is low and a 'win-lose approach' is adopted, stratagems are relevant (negotiators resort to rites and rituals as a tactics)	a competitive strategy is used	they do everything to win and use the context, situation and time; they are ready to negotiate on their terms

Thus, intercultural negotiations in Eastern tradition are quite complicated, complex and demanding. They tend to progress slowly, step by step, and build mutual trust between negotiators. Once one decides to come to terms with their Eastern partners, they should not expect the result overnight.

CONCLUSION

A comprehensive understanding of intercultural psychological features in negotiations and how to navigate them effectively necessitates a meticulous analysis of the pertinent theoretical underpinnings and the adoption of detailed strategies aimed at addressing biases in diverse cultural settings. To explore this subject, specific cases were selected to illustrate the most pivotal challenges associated with intercultural negotiation dynamics. Subsequently, the theoretical framework of research on intercultural psychology in the context of negotiation was utilized to elucidate the scenarios depicted in these cases.

Figure 1. Challenges and opportunities for the development of multicultural education

The research aimed at analysing psychological characteristics, behaviours, and attitudes across various cultures to establish the similarities and differences of human psychology in an intercultural context allowed to study the impact of cultural factors on individual and collective psychological processes through the assessment of the influence of cultural values, norms, and practices on the development of psychological traits and cognitive and emotional processes across diverse cultural contexts.

The analysis led to the determination of the mechanisms of interaction with the Eastern countries. The application of such mechanisms promotes better understanding and empathy between people from different cultural backgrounds.

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ARTÍCULO DE INVESTIGACIÓN

El teletrabajo y su impacto en la satisfacción laboral en los empleados recién egresados de estudios universitarios de pregrado

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Resumen: A causa de la pandemia COVID-19, muchas organizaciones se vieron en la necesidad de implementar la modalidad de trabajo a distancia. Debido a esa implementación forzada y a la importancia que se le debe dar al recurso humano, es necesario plantearse si dicha modalidad lleva consigo problemas de satisfacción laboral, principalmente en las personas que se encuentran en el inicio de su vida laboral. El objetivo de la presente investigación fue determinar si la modalidad de teletrabajo se relaciona con un nivel diferente satisfacción laboral en los empleados recién egresados de estudios universitarios de pregrado que aquellos que trabajan de manera presencial. Se realizó una revisión de literatura, se aplicó un test reconocido en su validez a 77 sujetos que fueron seleccionados al azar de un universo de 150 recién egresados de nivel de pregrado en el área de negocios de la Facultad de Comercio y Administración de Tampico, de la Universidad Autónoma de Tamaulipas y se realizó un análisis estadístico. El resultado obtenido permite determinar que no existe una diferencia significativa en la satisfacción laboral entre ambas modalidades en ese segmento de empleados.

Palabras clave: teletrabajo, trabajo presencial, satisfacción laboral, primer empleo, egresados universitarios.

Teleworking and its impact on job satisfaction in employees who recently graduated from undergraduate university studies

Abstract: Due to the COVID-19 pandemic, many organizations found it necessary to implement remote work. Due to this forced implementation and the importance that must be given to human resources, it is necessary to consider whether this modality entails problems of job satisfaction, mainly in people who are at the beginning of their working life. The objective of this research was to determine whether the teleworking modality is related to a different level of job satisfaction in employees who have recently graduated from undergraduate university studies than those who work in person. A literature review was carried out, a test recognized for its validity was applied to 77 subjects who were randomly selected from a universe of 150 recent undergraduate level graduates in the business area of the Faculty of Commerce and Administration of Tampico, the Autonomous University of Tamaulipas and a statistical analysis was carried out. The result obtained allows us to determine that there is no significant difference in job satisfaction between both modalities in that segment of employees.

Key words: teleworking, face to face work, work satisfaction, first job, university graduates.

INTRODUCCIÓN

En la actualidad el recurso humano, siendo uno de los componentes más importantes de una organización, sino es que el principal, ha sido ampliamente estudiado desde el siglo veinte.

Sin embargo, el contexto actual de un mundo afectado por una pandemia para la cual no se encontraba realmente preparado implicó nuevas realidades. A pesar de no ser ni un concepto ni una práctica nueva, ya que surge en los Estados Unidos en 1957 (Martínez Sánchez, 2012) y con el paso del tiempo se ha relacionado casi totalmente con labores relacionadas con el uso de las tecnologías de información y telecomunicaciones, el trabajo a distancia, *home office* o teletrabajo cobró una gran importancia, pasando de representar el 2,3% de la fuerza laboral en 1980, posteriormente un 4,3% en el año 2010 (Bloom, Liang, Roberts, Zhichun, 2014) hasta llegar a ser la forma de trabajo del 42% de los empleados en los Estados Unidos a causa de la pandemia COVID-19 (Bloom, 2020). Por otra parte, se ha demostrado que los jóvenes tienen mayor dificultad para poder acceder a algún puesto de trabajo, y que cuentan con condiciones laborales menos favorables que las del resto de la población (Lozano y Solano, 2020); para las instituciones de educación superior es primordial que sus egresados logren insertarse en el mercado laboral, de manera efectiva y satisfactoria acorde a las necesidades y capacidades tanto de los egresados como de los empleadores (Varona y Ramos, 2024). A raíz de la pandemia COVID-19, las organizaciones tuvieron que empezar a llevar a cabo tareas de manera diferente rápidamente y debieron actualizar sus habilidades en el uso de las tecnologías de la información y las comunicaciones para sobrevivir en un entorno que evolucionó drásticamente.

DESARROLLO

Planteamiento del problema

Debido a la pandemia COVID-19, muchas organizaciones se vieron en la necesidad de implementar la modalidad de trabajo a distancia, conocida como teletrabajo o *home office*; dicha modalidad no era nueva ya que cada vez más organizaciones la utilizaban por las ventajas que representaba; en México se había presentado una iniciativa de regulación en la materia desde el año 2018. Debido a esa implementación forzada y a la importancia que se le debe dar al recurso humano, es necesario plantearse si dicha modalidad lleva consigo problemas de satisfacción laboral, principalmente en las personas que se encuentran en el inicio de su vida laboral.

Preguntas, objetivos, hipótesis y modelo de investigación.

Por lo anterior se plantean la siguiente pregunta de investigación:

¿Existe diferencia en el nivel de satisfacción laboral de los recién egresados que laboran en la modalidad presencial y home office?

La variable independiente de la investigación es:

Modalidad de trabajo (presencial / home office)

Por otro lado, la variable dependiente de la investigación es:

Satisfacción laboral.

Considerando el modelo de investigación descrito anteriormente para este trabajo de investigativo, el objetivo general se plantea de la siguiente manera:

Objetivo general. Determinar si existe diferencia en nivel de satisfacción laboral de los recién egresados que laboran en la modalidad presencial y home office.

Hipótesis General: No hay diferencia en nivel de satisfacción laboral de los recién egresados que laboran en la modalidad presencial y home office.

Modelo de la investigación: El modelo planteado para el presente trabajo de investigación para medir y evaluar si la modalidad presencial y home office tiene un impacto en la satisfacción laboral en los recién egresados es el siguiente:

$$SL \propto MT$$

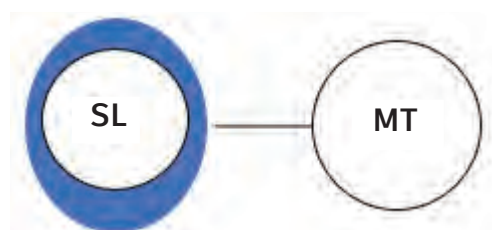
Donde:

SL = Satisfacción laboral

MT= Modalidad de trabajo

En la Figura 1 se muestra la representación del modelo de investigación:

Figura 1. Modelo de investigación



Revisión de literatura

Se realizó una amplia revisión de la literatura, de donde se puede destacar de manera muy puntual lo siguiente:

En el estudio “Adaptabilidad laboral post-pandemia en México” (OCC Mundial, 2022:2), que tuvo como uno de sus objetivos “Identificar desde la perspectiva de los buscadores de empleo y las empresas, cómo se encuentra el estado de ánimo de los encuestados que actualmente tienen empleo o que tuvieron empleo en los últimos 2 años” se encontró, como datos importantes:

- Un 77% de los encuestados señalan que sus colaboradores han tenido una adaptación al cambio entre buena y muy buena.
- Un 61% de las empresas se adaptaron de manera buena y muy buena a la flexibilidad.
- El 72% de los empleados afirman estar con un nivel de satisfacción y compromiso bueno - muy bueno, aunque los empresarios contrastan ese resultado con un 59% de compromiso y motivación de bueno a muy bueno acerca de sus empleados.
- El 33% manifiesta que su estado de ánimo en el ambiente laboral ha empeorado a partir de la pandemia.

Una de sus conclusiones afirma que después de la pandemia, los colaboradores mantienen buenos niveles de motivación y de compromiso, que podían mejorar con acciones que los hagan sentir que son parte de la empresa en la que laboran, favoreciendo su bienestar emocional.

Existe un estudio realizado en Medellín, Colombia (Gómez et al., 2019), que muestra que el egresado de una licenciatura demuestra una mayor satisfacción por los estudios cursados si éstos le permiten laborar en un área acorde con su perfil traduciéndose en un beneficio para él.

Por otra parte, en el estudio Satisfacción laboral en el contexto del teletrabajo forzoso (Guayacán et al., 2022) realizado en Bucaramanga, Colombia, muestra que la obligatoriedad del teletrabajo en lugar de ser asumida negativamente, generó un sentimiento de alivio en la época de pandemia, debido a la disminución del desplazamiento, posibilidad de dedicar mayor tiempo a reunirse en familia, genera menor contaminación, aunque esto es percibido de manera más generalizada en los mayores de cuarenta años.

METODOLOGÍA

Para este estudio se parte de la investigación documental que le da validez crítica y la técnica que se utilizó para la recolección de datos fue a través de encuestas aplicadas a una muestra de alumnos recién egresados de la Facultad de Comercio y Administración de Tampico, quienes fueron objeto del estudio. El universo fueron 150 recién egresados de licenciatura de la Facultad de Comercio y Administración de Tampico que contaban con un trabajo remunerado en el año 2023. Es importante señalar que se limitó a este universo debido a que se considera que es importante que la investigación científica ocurra a nivel local, porque la investigación de un área puede no ser aplicable al contexto y a las necesidades de otra región o grupo de personas (Gutiérrez, 2022).

Utilizando la fórmula para determinación de una muestra de una población finita (Survey Monkey, 2024), con los siguientes datos:

- Universo de 150 recién egresados
- Nivel de confianza: 95%
- Margen de error 8%

Se definió que la muestra constará de 77 sujetos

Software para utilizar: SPSS

El instrumento incluyó reactivos de instrumentos de investigación desarrollados y aplicados en el estudio Adaptabilidad laboral post pandemia en México (OCC Mundial, 2022), en el Modelo de satisfacción de egresados universitarios: un estudio de caso (Gómez, Palacios, Berrio, Gaviria, Quiceno y Figueroa, 2019), Diseño de instrumento para medir motivación laboral y compromiso organizacional en personal operativo de SIDUE (López e Ibarra, 2019) y Cuestionario de Satisfacción Laboral S4-82 (Melía y Peiró, 1998); se utilizaron reactivos ya probados debido a que la aportación práctica puede ayudar a los investigadores a contar con una herramienta que les apoye en sus investigaciones, además de sumar al estado del arte (Herrera et al., 2021).

Validación: Los ítems para medir el nivel de estrés se consideran válidos al ser tomados de estudios empíricos con resultados validados.

RESULTADOS

A continuación, se presenta el análisis estadístico de la investigación, presentando la Tabla 1, resumen del procesamiento de los casos.

A continuación se presenta la Tabla 2, pruebas de normalidad.

- 1) Se trabaja con la prueba de Kolmogorov-Smirnov debido a que el tamaño de la muestra o grados de libertad es mayor a 50 (76).
- 2) La variable Satisfacción Laboral (agrupada) no sigue una distribución de datos normal, ya que el valor p es menor al 0,05 % de alfa (.000).

TABLA 1. Resumen del procesamiento de los casos

	Casos					
	Válidos		Perdidos		Total	
	N	Porcentaje	N	Porcentaje	N	Porcentaje
Satisfacción Laboral (agrupada)	76	98,7%	1	1,3%	77	100,0%

En la Figura 2 que muestra la gráfica normal de satisfacción laboral.

En la Figura 3 se muestra el gráfico normal sin tendencias de satisfacción laboral.

TABLA 2. Pruebas de normalidad
Pruebas de normalidad

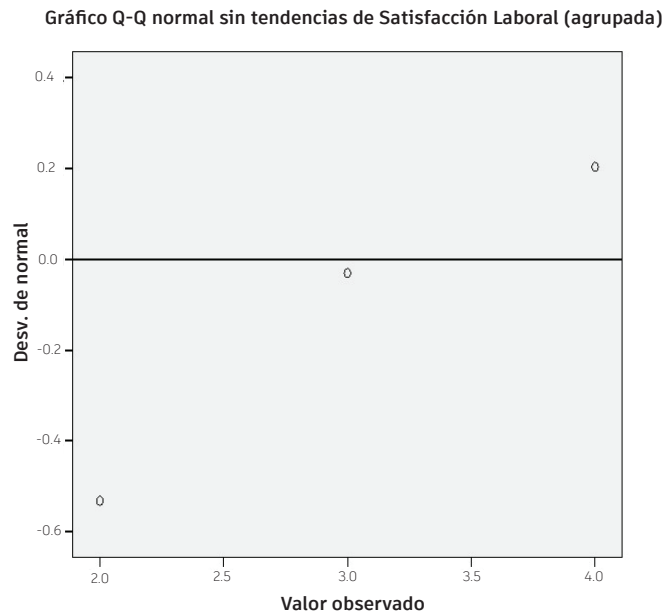
	Kolmogorov-Smirnov ^a			Shapiro-Wilk		
	Estadístico	gl	Sig.	Estadístico	gl	Sig.
Satisfacción Laboral (agrupada)	.352	76	.000	.719	76	.000

a Corrección de la significación de Lilliefors

Figura 2. Gráfico normal de satisfacción laboral



Figura 3. Gráfico normal sin tendencias de satisfacción laboral.



Se rechaza la prueba paramétrica de T de Student ya que, para ser utilizada dicha prueba, ambas variables deben cumplir o seguir el supuesto de normalidad y permite comparar solo a muestras pequeñas que sean menores o igual a 30 sujetos. Por lo tanto; nos centramos en un enfoque no paramétrico, en este caso utilizaremos el Test U de Mann - Whitney debido a que la variable dependiente es cualitativa ordinal, por dicho motivo se recomienda utilizar dicho test, mostrado en la Tabla 3:

TABLA 3. Prueba de Mann-Whitney

Rangos

	Modalidad de trabajo	N	Rango promedio	Suma de rangos
Satisfacción Laboral (agrupada)	Presencial	59	39,15	2.310,00
	Home office	17	36,24	616,00
	Total	76		

Y en la siguiente tabla 4:

TABLA 4. Estadísticos de contraste^a

	Satisfacción Laboral (agrupada)
U de Mann-Whitney	463.000
W de Wilcoxon	616.000
Z	-.547
Sig. asintót. (bilateral)	.584

^a Variable de agrupación: Modalidad de trabajo.

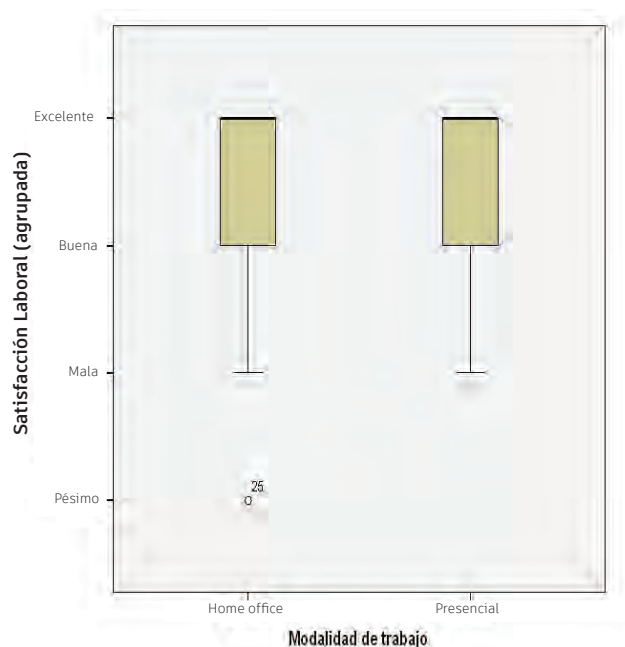
En primer lugar, se presenta una descripción de las modalidades de trabajo comparadas, la suma de rangos y un valor que representa cual modalidad tiene una mediana mayor, este dato es el rango promedio que se obtiene al dividir la suma de rangos de cada modalidad entre la cantidad de casos en el grupo.

En segundo lugar, se presentan los valores de la U de Mann – Whitney y de la razón z, así como el nivel de significancia de la prueba, al haber planteado una hipótesis de dos colas se usa la significancia bilateral. Si el nivel de significancia es menor o igual a 0.05 se tiene que rechazar la hipótesis nula, en este caso es mayor por lo que al no poder rechazar la hipótesis nula debemos concluir que el nivel de satisfacción laboral en los recién egresados es el mismo para ambas modalidades de trabajo (presencial y home office).

El nivel de satisfacción laboral es igual ($z = -.547$, $p > 0.05$) entre los trabajadores recién egresados que laboran en la modalidad presencial ($Md1 = 1$) y home office ($Md2 = 2$).

Podemos concluir que la mayoría recién egresados que laboran en modalidad de trabajo home office y presencial consideran su satisfacción laboral como mala, buena o excelente, se presenta un valor atípico, el cual muestra que sólo un empleado de la modalidad home office considera su satisfacción laboral como pésima, mostrada en la siguiente Figura 4 gráfico de resultados:

A continuación, se presenta la Tabla 5 con el resumen denominado “sumario de hipótesis”.

Figura 4. Gráfico de resultados.**TABLA 5.** Sumario de hipótesis.

Hipótesis	Resultado
H_0 : No hay diferencia en nivel de satisfacción laboral de los recién egresados que laboran en la modalidad presencial y home office	Aceptada
H_1 : Existe diferencia en nivel de satisfacción laboral de los recién egresados que laboran en la modalidad presencial y home office	Rechazada

DISCUSIÓN

A través de presente trabajo de investigación, al observar los valores de la U de Mann – Whitney y de la razón z, así como el nivel de significancia de la prueba, se puede concluir que el nivel de satisfacción laboral en los recién egresados es el mismo para ambas modalidades de trabajo (presencial y teletrabajo), a pesar de que el estudio “Adaptabilidad laboral post-pandemia en México” (OCC Mundial, 2022) muestra que a dos años del inicio de la pandemia han cambiado varios factores entre los colaboradores, tal como su estado de ánimo y nivel de motivación en el aspecto laboral; esto puede deberse a, como le menciona el estudio Satisfacción laboral en el contexto del teletrabajo forzoso (Guayacán, Zárate y Contreras, 2022), percepción de mejora se encuentra más generalizada entre los mayores de cuarenta años de edad.

CONCLUSIONES

La presente investigación permitió dar respuesta a la pregunta general de investigación: ¿Existe diferencia en el nivel de satisfacción laboral de los recién egresados que laboran en la modalidad pre-

sencial y home office? Dando como respuesta que no existe una diferencia significativa en el nivel de satisfacción relacionado con la modalidad laboral. Es importante señalar que se pueden abrir nuevas líneas de investigación enfocándose en un universo con similares características para determinar si la implementación del teletrabajo de manera permanente permite que los empleados que inician su vida laboral mejoren sus condiciones laborales que normalmente se consideran desfavorables en comparación con los empleados de mayor experiencia y antigüedad.

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Los valores familiares de los jóvenes rusos en el contexto de los cambios sistémicos globales¹

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¹The research was carried out at the expense of the subsidy allocated to Kazan Federal University for the project No. FZSM-2023-0022 “Digital socialisation and digital competence of young people in the context of global systemic changes: regulation technologies, risks, scenarios” within the framework of the state assignment.

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Resumen. En el contexto de las tendencias actuales en la agenda sociopolítica de la sociedad rusa, dirigidas a fortalecer los valores tradicionales, apoyar las familias numerosas y la fertilidad, parece necesario analizar los valores matrimoniales y familiares actuales y las actitudes reproductivas de los jóvenes modernos. Sobre la base de una encuesta a jóvenes estudiantes, se obtuvieron datos sobre sus actitudes hacia el matrimonio y la familia, su deseo e intención de tener hijos y sus modelos familiares preferidos. Este estudio tiene como objetivo examinar y comprender el estado de ánimo actual de los jóvenes en la esfera familiar y matrimonial en el contexto de la política social en curso dirigida a mejorar la situación demográfica en el país. Los resultados del estudio permiten concluir que los jóvenes de hoy están orientados a la creación de una familia, pero el valor familiar principal es el matrimonio más que la paternidad. El valor de los niños en el sistema de valores de vida de los jóvenes no es una prioridad. También se reveló la actitud hacia los niños de tamaño mediano (dos hijos en la familia), pero es alarmante que más de una cuarta parte de los encuestados indicó que la familia puede no tener hijos.

Palabras clave: jóvenes, valores familiares, modelos familiares, actitudes reproductivas.

Family values of Russian youth in the context of global systemic changes

Abstract. In the context of current trends in the socio-political agenda of Russian society aimed at strengthening traditional values, supporting large families and fertility, it seems necessary to analyse the current marriage and family values and reproductive attitudes of modern youth. On the basis of a questionnaire survey of young students, data were obtained on their attitudes towards marriage and family, their desire and intentions to have children, and their preferred family models. This study aims to examine and comprehend the current mood of young people in the family and marriage sphere in the context of the ongoing social policy aimed at improving the demographic situation in the country. The results of the study allow us to conclude that today's young people are oriented towards creating a family, but the main family value is marriage rather than parenthood. The value of children in the system of life values of young people is not a priority. The attitude towards medium-sized children (two children in the family) was also revealed, but it is alarming that more than a quarter of respondents indicated that the family may be childless.

Key words: youth, family values, family models, reproductive attitudes.

INTRODUCTION

In sociological discourse, the current situation of the family institution is largely regarded as a crisis. However, in recent years it is possible to observe some, albeit insignificant, changes in the opposite direction. According to official statistics from Rosstat, in 2022 we have reached the level of 2017 in terms of the number of marriages (7.2 marriages per 1,000 people). The number of divorces for 2022 also increased, but less noticeably (4.7 divorces per 1,000 people). So the divorce rate in 2022 is 65.3%, which is 0.7% less than in 2019 and 0.3% less than in 2018. If you visualise this graphically, you can see the gap between marriages and divorces getting larger, showing some growth in the importance of marriage over the past few years. The surge in divorces after 2019 is due to the covid period and yet the trend has not persisted but has changed direction somewhat (Sivoplyasova, 2023). However, the problem of fertility is much more acute as there has been a decline from 2016 to date. According to the data for 2022, the birth rate is 1.42, which is comparable to the crisis of 2007.

American sociologist Mauro Guillen, when analysing the demographic situation in the world, draws conclusions about the continuing decline in fertility (Guillén, 2020). The researcher demonstrates that in all developed countries, since the 1960s, childbearing has declined to the point of inability to reproduce the population (less than 2 children per family). Only countries in Africa are exceptions. While population growth in some countries is only due to migration. Based on demographic trends, Guillén says that low fertility will be a problem by 2030 and predicts a decline in the total world population.

It is known from historical sketches on demography of Russia that in the late XIX - early XX century the average number of children in a peasant family was nine, and in an urban family five-seven. In the second half of the XX century the birth rate has already decreased to the usual one or two children. Today, according to the "All-Russian Population Census" of 2020, in the Central

Federal District of Russia the number of single-child households is 60.4%, two-child households 30.9% and many-child households 8.7%. If we take data for the country as a whole, including remote and border regions, the number of large families is about 12 per cent. Domestic sociologists regularly conduct research to identify the actual reasons for the decrease or increase in the birth rate in families. I. Pavlyutkin, while studying 500 families with many children, identified the following key factors influencing the decision to have three or more children: value - trust between spouses and religiosity, socio-economic - income and education, as well as network support - from relatives and friends (Pavlyutkin, Goleva, 2020). Accordingly, the lack of these factors demotivates small families to have more children (Parfilova, 2015).

There are several classifications of family models in the scientific literature. The following typologies are of interest for our study (Downey, Lyons, Williams, 2022).

Russian sociologists proposed a classification of family models according to the style of upbringing and parental involvement in children's lives, including patriarchal, child-centred and conjugal models (Table 1).

TABLE 1. Classification of family models

Sign of separation	Family model	Description
Parenting and participation in children's lives	Patriarchal (traditional)	Dependence of children on parents. Authoritarian style of upbringing. Children are perceived as a labour force in the family.
	Child-centred (modern)	Raising children is the main meaning of family life. A child is desired and expected. Self-sacrifice for the sake of a child, indulging children's whims.
	Conjugal (post-modern)	Care for the development of each spouse and children as autonomous individuals. The value of independence, freedom and self-realisation of each family member.

The child-centred model is considered by some researchers as a transitional model, which is being replaced by the conjugal model and the concept of "quality time" spent with children. The preconditions for the emergence of detocentrism are the creation of capitalist society in the 18th and 19th centuries, the introduction of compulsory education for children and the restriction of their use in labour activities, which made children financially dependent on their parents. However, in the industrial era the ideal is childlessness as a way to increase the quality of life of spouses at the same labour costs. Thus, sociologists describe the following direction of changes in the structure of the institution: transition from patriarchal family (authoritarian style of upbringing; determination of children as a source of additional labour force), to a conjugal family, where the independence, freedom and self-realisation of each family member, including children, is the main one (Eflava, Maximova, 2019).

In the work on gender sociology Aulette & Connell (1991) identify a significant category considered in modern research – the distribution of power within the family in the context of gender role transformation. In the historical consideration of gender changes, the redistribution of power can be traced in each transition period. In this regard, we define a general typology of families on this basis, distinguishing patriarchal, matriarchal and egalitarian models (Table 2).

Table 2. Typology of families according to the distribution of power

Sign of separation	Type of family	Characterisation
The nature of power	patriarchal	Power is given to the eldest man (father) in the family
	Matriarchal	Power is given to the eldest woman (mother) in the family
	Egalitarian (partnership)	Power is situationally (equally) shared between spouses

American sociologist Morris Zeldich expands the typology of partner families, distinguishing the partner family with either husband or wife dominance, as well as the syncratic type, where power is distributed evenly. In turn, Zadvornova (2013), in her study of modern provincial families, differentiates the egalitarian model and defines: Soviet, neopatriarchal, bicareer and egalitarian (Table 3).

Table 3. Family models by gender role distribution

Sign of separation	Family model	Description
Gender distribution of roles	Soviet	Labour employment of both spouses. In this case, the woman's "double" workload is maintained, as domestic labour is entirely her responsibility.
	Neopatriarchal (sponsored)	The husband is a representative of the economic elite. The wife fulfils the role of a housewife. The difference from the patriarchal model of the 20th century is in the changed position of the woman. She has power in the domestic and educational sphere, and can also delegate household chores to domestic workers.
	BicARRIER	Spouses are equally oriented towards professional and career growth. At the same time, they do not intend to sacrifice them for the sake of fulfilling family obligations. The latter role is assigned to relatives or employees.
	Egalitarian	Both spouses participate equally in professional and domestic work.

The results of the study conducted by the researcher on a sample of 1200 people show the prevalence of the "Soviet" model (69%). While the "egalitarian" model is characteristic of a small number of families (4%). However, the sociologist studied the families of generation X, which is characterised by conformism expressed in adherence to the Soviet model. Some researchers note that the "Soviet" model is still present in Russian society and determines a significant share of families (Kletsina, Vekilova, 2020). Thus, the general trend of changes is characterised by the transition from patriarchal to egalitarian (partner) type of family.

MATERIALS AND METHODS

As part of our own sociological research aimed at identifying the marriage and family values and attitudes of young people, a sociological survey was conducted using the online questionnaire method (n = 640). The object of the study was Russian student youth aged 18 to 25 years old. The sample is mainly represented by young people from such cities as Kazan, Saransk, Saratov. The data were analysed using statistical methods in SPSS software.

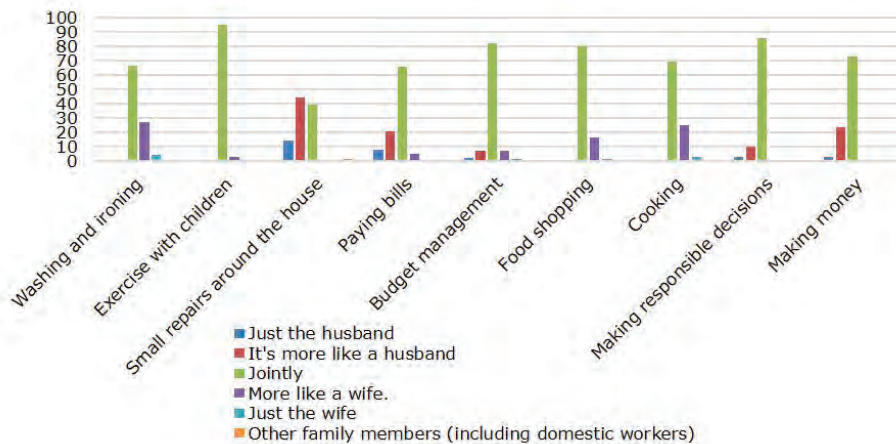
Marital and family values of today’s youth were measured through three operational indicators:

1. Young people’s perceptions of gender roles in the family and society;
2. Reproductive attitudes of young people;
3. Preferred family models and family practices of young people.

RESULTS

The first block of questions of the questionnaire was aimed at identifying the attitudes of young people on the distribution of gender roles in the family. The results show that respondents mainly have attitudes towards joint distribution of family responsibilities, which corresponds to the egalitarian type of family (see Figure 1).

Figure 1. How do you think the following responsibilities should be distributed between spouses in a family/couple? (%)



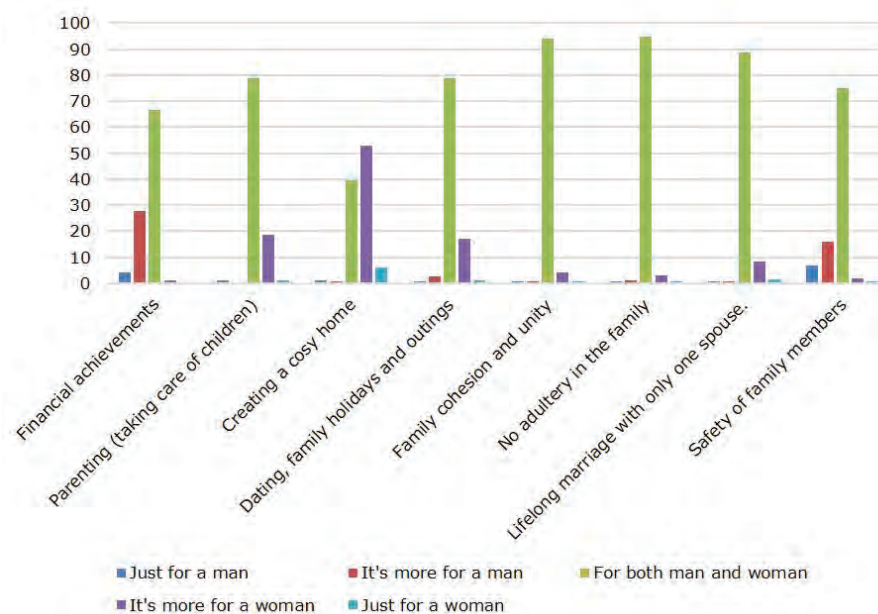
The exception is “minor household repairs”, which the respondents define rather to a man, which indicates the preservation of traditional ideas in the field of men’s duties for a significant part of respondents (49%). It is also worth noting that the largest number of respondents (95.5%) are in favour of combining the duty of occupation with children. This confirms the hypothesis that children and fatherhood have become an integral part of a man’s life in the eyes of modern youth.

In this context, the distribution of attitudes by gender is interesting. The performed conjugacy analysis shows that men, in percentage terms, were significantly less likely to be in favour of joint distribution and more likely to distinguish between male and female responsibilities. For example, they were more likely to identify “washing and ironing things” as a woman’s responsibility (44%)

than women themselves (28.2%, at $\chi^2=14.794$ and $p=0.011$). At the same time, traditionally male duties such as “minor household repairs” were similarly attributed more to men (84%) than women themselves (50.8%). The same results were obtained for the categories “earning money”, “protecting family members from dangers”, “making responsible decisions”, “cooking”, and “managing the budget”. However, in the categories “activities with children”, “paying bills”, “choosing food”, the egalitarian type of distribution dominates, preferred by men and women equally.

The results regarding the importance of life values between men and women in the family were interesting (see Figure 2).

Figure 2. In your opinion, for whom - a man or a woman - in the family is more important... (%)



Most of the selected values are characteristic for both men and women. An exception was found in “creating home comfort”. Both men and women believe that it is rather important for women (53%) than for both sexes (39.4%). This means that the role of a hostess in the house is attributed by today’s youth predominantly to a woman, which is in line with traditional perceptions. There is also a significant share of respondents who attribute “financial achievements” rather to the values of a man (27.7%). At the same time, a difference in the answers of men and women was also revealed. A total of 52% of men and 25.7% of women attribute them to the values of a man only or rather a man. This indicates that a significant part of today’s youth adhere to traditional values and assign the role of a provider, earning money for the family, to a man. Moreover, there are twice as many men as women among those who think this way.

In the issue of ensuring material well-being of the family, young men also more often than girls attributed it to the man’s responsibility (38% vs. 25.4%), which is a marker of the attitude to the patriarchal (neo-patriarchal) family model. Otherwise, the difference in answers remains at the error level. In general, 44.4% of the respondents believe that the one who is more capable of earning according to his/her predispositions and competences should provide for the family (egalitarian family model); 28.4% believe that a man should provide predominantly (patriarchal model) and 24.1%

prefer joint employment in the family (Soviet model). Thus, in the financial sphere of the family, the opinion of young people is divided. The egalitarian model is in the lead by a certain margin, while the patriarchal and Soviet models share the second place.

In addition, we present data on answers to the question about distribution of power in the family, since it is power that largely predetermines the family way of life and its status in the society (see Table 4).

TABLE 4. In your opinion, who should be the head of the family and make important decisions for the family? (%)

Answer options	Your gender		Total
	Female	Male	
The eldest man in the family (father)	11.0%	29.0%	15.3%
The eldest woman in the family (mother)	0.3%	0.0%	0.2%
The one who is the main breadwinner in the family and provides for it	3.1%	5.0%	3.6%
Someone who is more aware of the current situation and can make a decision that is effective for the family	43.6%	40.0%	42.7%
There should not be a head of the family - decisions are made jointly. But in the sphere of the household (children) decisions are more often made by the woman	35.7%	25.0%	33.2%
Other	6.3%	1.0%	5.0%

The option “the one who is better oriented in the current situation and can make a decision effective for the family” corresponds to the egalitarian family model (42.7%), and “there should be no head of the family - decisions are made jointly. But in the sphere of the household (children) decisions are more often made by a woman” corresponds to the Soviet model (33.2%). In third place is the patriarchal type of family, where power is in the hands of a man (15.3%). At the same time, cross-analysis showed that the patriarchal model is chosen more often by men (29%) than by women (11%). Since the option “the one who is the breadwinner in the family and provides for it” was chosen by only 3.6% of the respondents, it can be concluded that power in the family in the eyes of modern youth is not defined only by the ability to earn and financially provide for the family. Consequently, the neo-patriarchal family model is not popular among young people. Young people prefer to entrust the right to choose to someone who is more competent in the situation, or to jointly agree on making important decisions.

To identify the current expectations of young people towards potential spouses, respondents were asked to choose certain personality traits characteristic of an “ideal husband” and an “ideal wife”. The following feminine, masculine and androgynous qualities were offered for selection (see Table 5).

TABLE 5. Distribution of personality traits and their gender characteristics

Quality	Characterisation
Physical strength	Masculine qualities
Ability to ensure material prosperity	
Commitment and determination	
Courage	
Obedience and discipline	Feminine qualities
Tenderness and softness	
Politeness and courtesy	
Love for children	
Housekeeping	Androgynous
A well-developed mind, intelligence	
Kindness	
Sense of humour	

The dependence of the choice of certain qualities on the gender of the respondent was found. Girls chose “developed mind, intellect” (76.2%), “purposefulness and determination” (72.4%), “ability to provide material wealth” (71.5%), “kindness” (64.3%), and “love for children” (61.1%) as the five main features of an “ideal husband”. Men, in turn, attributed to the qualities of an “ideal husband” - “well-developed mind, intellect” (89%), “ability to ensure material prosperity” (79%), “purposefulness and determination” (75%), “sense of humour” (54%). Such a quality as “love for children” was attributed to the characteristics of an ideal husband by slightly less than half of respondents (49 per cent). In general, this corresponds to women’s perceptions, but there are differences in the choice. For example, among men, only 47 per cent attributed the quality “kindness” to the portrait of an ideal husband, so it was not included in the top five qualities. The analysis also showed that the quality “love for children” was chosen by 61 per cent of women and only 49 per cent of men, and “tenderness and gentleness” was chosen by 31 per cent of women and only 15 per cent of men. At the same time, among other qualities, men more often than women identified strongly masculine traits as advantages of an ideal husband. Thus “physical strength” was chosen by 47% of men and only 26.3% of women, and “courage” - by 30% of men and 21.9% of women. Among women the situation is respectively opposite, the results of the survey show that women more often expect kindness and love for children from men.

The following data were obtained on the question about the qualities of an ideal wife. Men more often chose “tenderness and softness” (82%), “thriftiness” (79%), “love for children” (77%), “kindness” (72%), “developed mind, intellect” (65%). Women, in turn, chose “tenderness and softness” (71.5%), “thriftiness” (71.5%), “kindness” (71.5%), “developed mind, intellect” (71.2%), and “love for children” (68.7%). The distributions of qualities among male and female respondents generally coincide, but the percentages are different. Love for children in the image of an ideal wife, according to young girls, is in fifth place. While in the case of men this quality is in third place, which indicates a slightly higher preference of men to see a woman as a caring mother of their children. Among the remaining qualities, differences in the responses of men and women were also

found. Girls more than twice as often attributed “purposefulness and determination” to the qualities of an ideal wife (54.9%) than young men (24%). At the same time, 30% of male respondents and only 16.6% of female respondents preferred “obedience and well-manneredness”. This may indicate that some men expect their future wives to be mainly obedient and well-mannered, while women themselves tend to be more purposeful and determined. This requires special attention and additional research.

In students’ perceptions, a normal Russian family should have two children; this answer option was chosen by a third part of respondents (33.2%). However, it is alarming that a significant share of respondents (28.4%) chose the answer option “A family can have no children” (See Table 6).

TABLE 6. Distribution of respondents’ answers to the question: In your opinion, how many children should a Russian family have?

Answer options	%
1. One is enough	9.8
2. Two children	33.2
3. Three children	10.5
4. More than three children	1.7
5. A family can be a family without children	28.4
6. I can’t answer that	16.5
Total	100

Young people describe their own intentions regarding children as a desire to have two children (34.4%). 11.5% of respondents plan to have one child, and 13.4% of respondents plan to have three children. At the same time, 18.4% chose the answer option “I am against planning a certain number of children”. Thus, we can conclude that one third of young people see the Russian family as a two-child family (average number of children) and wish to have the same number of children. The absence of a desire to have children is characteristic of only 8.1% of respondents. However, 28.4% of young respondents admit that a family can be without children, considering it normal.

This is also confirmed by the answers to the question about choosing among the proposed statements. The first statement - “only spouses with children can be considered a normal Russian family”, the second - “spouses even without children can be considered a normal Russian family”. As a result, 49.1% fully or partially adhered to the second statement and only 27.1% were inclined to the first one. Neutral assessments were given by 23.6% of respondents.

Among the factors positively influencing the desire to have children, young people consider “high incomes of both or one of the spouses” (84.2%), “trust and mutual understanding between spouses” (68.7%), “security and stability in the country” (58.7%). Raising the prestige of families with children and social benefits were chosen by only 9.1% and 24.3% of respondents, respectively. Consequently, government actions aimed at financial support for families with children and raising their prestige do not appear to be motivating for most young people. This emphasises the urgency of developing effective measures in the sphere of state family policy.

This study also analysed the preferred family models on the basis of parenting and participation in children's lives, among which patriarchal, child-centred and spousal models are distinguished (See Table 7).

TABLE 7. Distribution of respondents' choices regarding the statements

Answer choice	Your gender		Total
	Female	Male	
Children in the family should help with household chores and chores. They should be taught family and moral values	36.7%	45.0%	38.7%
Children should come first and receive maximum care. It is better to deny something to yourself than to your child	10.3%	18.0%	12.2%
Children stand on equal footing with their parents and develop freely. Parents care for their children as much as they care for themselves	49.5%	28.0%	44.4%
Children develop freely. At the same time parents are more occupied with self-realisation and career advancement. The upbringing and care of children lies with experienced people (relatives or nannies)	2.2%	4.0%	2.6%

A statistically significant dependence was found when pairing with the respondent's gender. Young men are more inclined to choose the patriarchal (traditional) family model, where children are perceived as an additional labour force, there is an authoritarian style of upbringing, and family values are instilled (45%). Girls, in their turn, more often chose the conjugal (post-modern) model, where there is equality of family members among themselves and children are taken care of in the same way as they take care of themselves (49.5%). In comparison with female representatives, only 28 per cent of young men surveyed chose such a model of family upbringing. However, it is impossible to draw an unambiguous conclusion that they prefer only the traditional model, as a difference was also observed in the choice of the child-centred family model, which is characterised by the answer option "it is better to sacrifice one's own desires but take care of the child". This option was preferred by 18% of men and 10% of women, which indicates that men are slightly more willing to take care of children even to the detriment of their own interests.

The results of our survey also showed that a significant proportion of young people have a neutral (37%) or positive (31.7%) attitude towards abortion. Only 11% of respondents categorically deny abortion. No difference in the answers between men and women was found ($p=0.239$). However, a direct correlation was noticed on the basis of belief. 48.9% of people who do not consider themselves believers and only 4.7% of people who consider themselves believers have an unequivocal positive attitude towards abortion ($\chi^2 = 137.253$ and $p=0.00$). This suggests that non-believers are more tolerant of abortion and believe that termination of pregnancy is acceptable. While believers are either neutral or strongly opposed to abortion.

It was also observed that boys and girls have different attitudes towards the fact that a woman can make her own decision about abortion, even if the father of the child is against it. According to the cross-sectional analysis, 57.4 % of girls chose a positive attitude. For young men, this percentage is about half as high at 26%.

When asked what could influence the adoption of a joint decision on the preservation or termination of pregnancy with the father of the child, the respondents chose the answer options “in any case decisions are made jointly” (54.9%), “spouses are married” (37.4%). Thus, we can conclude that, in general, today’s young people believe that such a decision should be made jointly and demonstrate the special significance of an official marriage union between people. At the same time, men are more interested in joint decision-making than women, which may indicate the increasing role of fatherhood in modern conditions.

In order to identify how modern young people view large families, respondents were asked to evaluate them according to the attributes of “happiness”, “security”, “freedom”, “activity in society” and “well-being”. Average scores for each attribute were obtained, which means a balanced image of a large family in the eyes of respondents. In other words, young people do not consider these families to be unambiguously happy or unhappy; well-off or unprovided, etc., giving mostly neutral assessments. However, if we consider only the part of respondents who chose assessments other than neutral, then such characteristics of large families as “happier”, “poorer” and “active in society” were more frequent (FitzGerald, Quiñones, 2023).

The survey results revealed another noticeable trend - postponement of childbirth to a more distant perspective. Respondents were asked to determine at what age, in their opinion, it is best to plan the birth of the first child. The results show that the majority of respondents (52.7%) consider the age of 23-26 to be the optimal age for a woman to have her first child. In relation to a man, opinions were divided into two equal groups: those who chose the age of 23-26 and 27-30 (35.8% and 36% respectively). Among the reasons preventing the birth of children, respondents singled out “lack of money” (92.8 %), “incomplete education” (60.4 %) and “lack of confidence in a partner” (57.5 %). Thus, young people tend to postpone having children until later, especially men, which may be related to the desire to achieve financial stability and complete their education. Financial issues play a key role in the decision to have children, reflecting the economic realities and priorities of young people.

CONCLUSION

Based on the results obtained, we can conclude that there is a significant separation of different family models in society. Among the main ones is the egalitarian model based on equality and complicity of spouses. However, there are also adherents of the patriarchal and Soviet models among young people.

In general, young people want to have children, but at the same time, a significant proportion of respondents consider childlessness to be the norm. Young people are determined to have quality family relations and wish to be ready for having children, both financially and psychologically. They take the choice of a spouse quite seriously and do not seek early marriages, emphasise the lack of mutual understanding between spouses as an obstacle to the desire to have children and name the main reason for divorces. Also, the younger generation tends to consider the quality of relationships in marriage more valuable than its duration, which allows us to conclude about the further spread of “serial monogamy”.

Based on the obtained results, it can be concluded that young men significantly more often than girls prefer traditionalism in the family related to the role of a provider, leader and distribution

of household duties. Exactly the same differences are noticed on the basis of faith. Young people who consider themselves believers more often distribute gender roles traditionally.

The reproductive attitudes of young people and the level of stability of young families will largely determine the prospects for demographic development of Russian society. Therefore, the social policy of the state should include the implementation of an effective youth policy aimed at ensuring the necessary conditions for the creation and development of young families, as well as the formation of value orientations and attitudes towards large families and the preservation of a complete family.

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INTERACCIÓN Y PERSPECTIVA

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Asuntos problemáticos de la educación a distancia desde la perspectiva de la teoría crítica de la sociedad. Ideología, alienación y poder en contextos de aprendizaje

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Resumen. Si bien el aprendizaje a distancia proporciona acceso y flexibilidad, también plantea una serie de preguntas (problemas) desde una perspectiva crítica propia de la teoría social. Además, el poder se manifiesta en la forma en que se diseñan e imparten los cursos en plataformas digitales, que favorecen algunas narrativas y marginan otras. Esta dinámica puede limitar el pensamiento crítico y la creatividad que son esenciales para el logro del aprendizaje significativo. Por lo tanto, el objetivo de la investigación es debatir hermenéuticamente algunos asuntos problemáticos de la educación a distancia desde la perspectiva de la teoría crítica de la sociedad, con especial énfasis en las variables: ideología, alineaciones y poder en entornos educativos. Los resultados obtenidos permiten suponer que es muy importante abordar estas cuestiones y transformar la educación a distancia en un espacio inclusivo e igualitario que anime y empodere a todos los estudiantes del mundo actual. Se concluye que, uno de los principales problemas es la brecha digital, que se manifiesta en la desigualdad de acceso a dispositivos y conexión a internet, lo que deja a muchos estudiantes del sur global en desventaja.

Palabras clave: educación a distancia, teoría crítica de la sociedad, acción comunicativa, ideología, alineación y poder.

Problematic issues in distance education from the perspective of critical theory of society. Ideology, alienation, and power in learning contexts

Abstract. While distance learning provides access and flexibility, it also raises several questions (problems) from a critical social theory perspective. In addition, power is manifested in the way courses are designed and delivered on digital platforms, which favor some narratives and marginalize others. This dynamic can limit the critical thinking and creativity that are essential for the achievement of meaningful learning. Therefore, the objective of the research is to hermeneutically discuss some problematic issues of distance education from the perspective of the critical theory of society, with special emphasis on the variables: ideology, alignments, and power in educational environments. The results obtained allow us to assume that it is very important to address these issues and to transform distance education into an inclusive and egalitarian space that encourages and empowers all students in today's world. It is concluded that, one of the main problems is the digital divide, which manifests itself in unequal access to devices and internet connection, leaving many students in the global south at a disadvantage.

Keywords: distance education; critical theory of society; communicative action; ideology, alignment and power.

INTRODUCCIÓN

En los dominios de la era digital, la educación a distancia, mediada por tecnologías de la información y comunicación (TIC), ha emergido como una solución ante la crisis educativa provocada por la pandemia del COVID-19 y otras venideras. Sin embargo, esta modalidad presenta múltiples asuntos problemáticos. Uno de los principales desafíos es la brecha digital, que se refiere a las desigualdades en el acceso a dispositivos y conexiones de internet.

Según Gómez, Alvarado, Martínez y Díaz de León (2018), las dificultades de conectividad afectan significativamente el rendimiento académico de los estudiantes, generando un ambiente de aprendizaje desigual donde aquellos con menos recursos enfrentan mayores obstáculos para participar en clases virtuales. Junto a esta realidad, la falta de formación en competencias digitales también contribuye a esta problemática, ya que no todos los estudiantes poseen las habilidades necesarias para navegar eficazmente en entornos virtuales, tal como sostienen categóricamente Mendoza, Navarro, Cejas, Vinueza y Vega (2021).

Al decir de Pérez-Alia y Perochena-González (2023), otro aspecto crítico es la alienación que puede surgir en contextos de aprendizaje a distancia. Desde un punto de vista socio-antropológico, la educación en línea tiende a deshumanizar el proceso educativo, limitando la interacción social y emocional entre estudiantes y docentes que se da en el contacto persona a persona. En líneas generales, esta falta de contacto humano propia de la sociedad digital puede llevar a una disminución del compromiso y la motivación de los alumnos, afectando su capacidad para aprender y relacionarse con sus pares (Pérez-Alia y Perochena-González, 2023). Al mismo tiempo, el enfoque predominantemente técnico de la educación a distancia puede desdibujar la importancia de las relaciones interpersonales que son fundamentales para el logro de un aprendizaje con significado.

En el marco de este debate simultáneamente político y filosófico, el objetivo general de esta investigación es debatir hermenéuticamente algunos asuntos problemáticos de la educación a distancia desde la perspectiva de la teoría crítica de la sociedad, con especial énfasis en las variables: ideología, alienación y poder en entornos educativos. De este objetivo surgen tres preguntas transversales: ¿Cómo influyen las ideologías dominantes en la implementación de políticas educativas relacionadas con la educación a distancia? ¿De qué manera la alienación afecta el proceso de aprendizaje y la interacción social entre estudiantes y docentes? Y ¿Qué papel juega el poder en la distribución de recursos y oportunidades dentro del contexto educativo virtual?

Por su capacidad heurística y cognitiva, la teoría crítica de la sociedad ofrece un marco interpretativo valioso para analizar estos problemas. Y es que, su enfoque dialéctico permite explorar cómo se interrelacionan ideología, alienación y poder en contextos educativos. En palabras de Ritzer (1993), esta teoría no solo critica las estructuras del poder hegemónico existente que perpetúa desigualdades materiales y simbólicas, sino que también busca comprender cómo estas estructuras afectan las experiencias individuales de aprendizaje. Definitivamente, la capacidad heurística de esta teoría radica en su potencial para revelar las dinámicas ocultas que operan dentro del sistema educativo y exponer cómo estas pueden ser transformadas para promover una educación más equitativa y justa.

La importancia de aplicar una perspectiva crítica se hace evidente al considerar cómo las ideologías subyacentes influyen en las prácticas educativas, tal como lo explico Freire (1970). Más aun, en la época actual las TIC no son neutrales; están impregnadas de valores e intereses que pueden perpetuar desigualdades si no se cuestionan adecuadamente en todo su alcance y significado. En este sentido, el análisis crítico permite identificar cómo ciertas narrativas sobre la educación digital pueden favorecer a grupos privilegiados mientras marginan a otros (Aguilera, 2023). Esta mirada invita a repensar, entonces, las prácticas educativas actuales y a buscar formas más inclusivas y justas de enseñanza para todos.

LITERATURA REVISADA

La literatura reciente también destaca cómo el fetichismo tecnológico puede influir negativamente en la educación a distancia. Esta noción se refiere a la creencia errónea de que las tecnologías por sí solas pueden resolver todos los problemas educativos sin considerar el contexto social y cultural (Capobianco Vieyto, 2023). Este fetiche puede llevar a una desvalorización del rol del docente, quien es visto como un mero facilitador en lugar de un guía esencial en el proceso educativo. Por lo tanto, la crítica a esta visión instrumental es fundamental para revalorizar el papel del educador como un actor clave en el aprendizaje significativo y en la moral social.

A su vez, se ha documentado que los problemas relacionados con la desigualdad digital no solo afectan a los estudiantes, sino también a los docentes no capacitados en el manejo de las TICs. Aun en pleno siglo XXI, muchos educadores carecen de competencias digitales adecuadas, lo que limita su capacidad para implementar estrategias efectivas en entornos virtuales tal como lo indican (Gómez et al., 2018). Para los autores de esta investigación, esta situación crea un ciclo vicioso donde tanto alumnos como maestros se ven atrapados en un sistema que no favorece su desarrollo integral.

Finalmente, se debe considerar también cómo estas dinámicas impactan el poder dentro del ámbito educativo. La distribución desigual de recursos tecnológicos refuerza jerarquías existentes y perpetúa un sistema donde solo ciertos grupos tienen acceso a una educación de calidad (Vallejo

González, 2024). La teoría crítica nos invita a cuestionar estas estructuras y buscar alternativas que promuevan una mayor equidad en el acceso y participación dentro del sistema educativo. Pero, además, del seno de la teoría crítica de la sociedad se configura una pedagogía crítica:

La pedagogía crítica es un enfoque de la enseñanza y el aprendizaje que se basa en fomentar la agencia y empoderar a los alumnos (crítica implícita y explícitamente las estructuras de poder opresivas). La palabra “crítico” en Pedagogía Crítica funciona en varios registros: Crítico, como en misión crítica, esencial; como en la crítica y las críticas literarias, proporcionando definiciones e interpretación; como en el pensamiento reflexivo y matizado sobre un tema; como al criticar los impedimentos institucionales, corporativos o sociales para el aprendizaje; pedagogía crítica, como enfoque disciplinario, que flexiona (y se inflexiona) cada uno de estos otros significados (Traducción de autor, p. 4) (Citado por Vallejo González, 2024, parr., 7).

En este particular, conviene recordar que, la teoría crítica de la sociedad, formulada por la Escuela de Frankfurt, se centra en el análisis de las estructuras sociales y las dinámicas de poder que perpetúan la opresión y la alienación. Jürgen Habermas (1999), uno de sus principales exponentes, argumenta que la comunicación es fundamental para la construcción de una sociedad democrática y justa. En su obra, Habermas critica la racionalidad instrumental que predomina en las sociedades modernas, proponiendo en su lugar una racionalidad comunicativa que fomente el entendimiento mutuo y el diálogo crítico entre los individuos. Esta perspectiva busca entender la realidad social y simultáneamente transformarla a través de un proceso participativo y deliberativo.

En palabras de Ferrater Mora (2004), Herbert Marcuse y Theodor Adorno también aportaron significativamente a esta corriente de pensamiento crítico y contrahegemónico. Marcuse, en su obra “El hombre unidimensional”, destaca cómo la sociedad industrial moderna ha creado un sujeto unidimensional que acepta pasivamente las condiciones de su existencia, limitando su capacidad crítica y su libertad. Adorno, por su parte, enfatiza la importancia de una crítica radical que examine las contradicciones del capitalismo y los mecanismos de dominación cultural (Russell, 2002). Para él, es esencial cuestionar las normas establecidas y reconocer cómo estas moldean la conciencia colectiva. Por estas razones, la teoría crítica busca así desentrañar las relaciones asimétricas de poder que estructuran la sociedad y, fundamentalmente, fomentar una conciencia crítica que permita la emancipación individual y colectiva.

En definitiva, abordar los asuntos problemáticos de la educación a distancia desde una perspectiva crítica permite revelar las complejas interacciones entre ideología, alienación y poder. Esta teoría de base hermenéutica y fenomenológica, por un lado, ayuda a identificar las deficiencias actuales del sistema educativo y; por el otro, ofrece herramientas cognitivas para el logro de una transformación significativa que beneficie a todos los actores involucrados en el proceso educativo en pleno siglo XXI.

METODOLOGÍA

La metodología hermenéutica aplicada a la educación a distancia se basa en la premisa de que la interpretación es la clave para comprender los procesos educativos. Esta perspectiva al mismo tiempo metodológica y epistemológica reconoce, siguiendo a Gadamer (2004), que el aprendizaje no es simplemente un acto de transmisión de información, sino un proceso complejo en el que los estudiantes construyen significados a partir de sus experiencias previas y del contexto en el que se en-

cuentran inmersos. Según refiere Díaz, “La educación como proceso de aprendizaje-enseñanza es un evento hermenéutico que tiene que ser estudiado en sus condiciones de posibilidad para que pueda ocurrir de manera efectiva” (2020, p. 23). Esta acción implica que los educadores deben facilitar un entorno donde los estudiantes puedan dialogar y reflexionar sobre el contenido, promoviendo así una comprensión más profunda y significativa.

En términos metodológicos, la relación entre la teoría crítica de la sociedad y la metodología hermenéutica radica en su visión compartida hacia la transformación social y la emancipación del individuo. La teoría crítica busca desentrañar las estructuras de poder y las ideologías que perpetúan la desigualdad, mientras que la hermenéutica proporciona las herramientas para interpretar y cuestionar estas estructuras en contextos educativos. Como señala el artículo de Fuster Guillen (2019), la hermenéutica filosófica facilita un diálogo auténtico y enriquecedor entre docentes y estudiantes, promoviendo una educación más humana, reflexiva y contextualizada. De modo que, tanto educadores como estudiantes se conviertan en agentes activos en la construcción del conocimiento, desafiando las narrativas dominantes que pueden estar presentes en la educación a distancia (Capobianco Vieyto, 2023).

Desde una perspectiva hermenéutica, se puede revelar cómo la ideología, la alienación y el poder operan en contextos de aprendizaje a distancia. La ideología puede influir en cómo se perciben las herramientas tecnológicas y su uso en el proceso educativo; por ejemplo, si se considera que estas herramientas son meramente instrumentales, se corre el riesgo de deshumanizar el proceso de enseñanza-aprendizaje. Al abordar estos aspectos desde una visión crítica, se puede entender cómo los estudiantes pueden sentirse alienados cuando no logran conectar el contenido con sus propias experiencias y realidades. Moreno Olmedo (2008), enfatiza que: “La interpretación filosófica de la Educación a Distancia permite visibilizar las tensiones entre tecnología y pedagogía”, lo cual es crucial para abordar estas problemáticas en los mundos de vida donde se producen y reproducen dialécticamente.

En definitiva, la visión hermenéutica permitió explorar cómo el poder se manifiesta en las dinámicas educativas mediadas por tecnologías. Las estructuras de poder pueden influir en quién tiene acceso a recursos educativos y cómo se distribuyen las oportunidades dentro del entorno virtual. A través del análisis hermenéutico, los investigadores de este artículo científico lograron identificar estas dinámicas y proponer estrategias para empoderar a los estudiantes, promoviendo así una educación más equitativa. Más allá de sus limitaciones operativas, este enfoque no solo ayuda a desentrañar las complejidades del aprendizaje a distancia, sino que también ofrece caminos hacia una práctica educativa más inclusiva y consciente de las desigualdades existentes (Vallejo González, 2024).

A MODO DE ANÁLISIS Y DISCUSIÓN DE RESULTADOS

Todas las fuentes consultadas indican que, las ideologías dominantes juegan un papel crucial en la implementación de políticas educativas relacionadas con la educación a distancia (Teachers Institute, 2023). Estas ideologías no solo influyen en el contenido curricular, sino también en las estructuras y enfoques pedagógicos adoptados por las instituciones educativas. Por ejemplo, en muchos países, la ideología neoliberal ha llevado a la privatización de la educación, donde se prioriza el rendimiento medible y la eficiencia sobre el aprendizaje integral. Según Klopov et al. (2023), la educación se convierte en un medio para perpetuar las desigualdades sociales, ya que las políticas

educativas reflejan los intereses de aquellos que detentan el poder. Al decir de Nussbaum (2016), esta realidad resalta cómo las ideologías neoliberales pueden moldear las políticas educativas de manera que favorezcan a ciertos grupos mientras marginan a otros.

Según Fontana (1999), estas ideologías dominantes pueden influir en la forma en que se perciben y utilizan las tecnologías en la educación a distancia. La creencia en la superioridad de las herramientas tecnológicas puede llevar a una implementación sin considerar adecuadamente las necesidades y contextos de los estudiantes.

Ahmad (2023), señala que las ideologías presentes en la gestión educativa pueden transformar la educación en un proyecto de ingeniería social sumamente alienante, donde se busca moldear comportamientos y actitudes conforme a una visión particular que responde a intereses de poder. Esta construcción educativa, puede resultar en un enfoque educativo que no solo ignora las realidades de los estudiantes, sino que también puede alienarlos aún más del proceso educativo con sentido y significado, propio de la educación emancipadora de la hablo en su momento Freire (1970).

Siguiendo con Freire (2008), la alienación es otro factor crítico que afecta el proceso de aprendizaje y la interacción social entre estudiantes y docentes en entornos de educación signados por la pobreza. Esta alienación puede surgir debido a la falta de interacción física y emocional, lo que limita el desarrollo de relaciones significativas, como es el caso en la educación a distancia. Un estudio realizado por Gómez et al. (2018) revela que los docentes experimentan sentimientos de alienación al no poder establecer conexiones auténticas con sus estudiantes durante las clases en línea. Este fenómeno cognitivo no solo afecta a los docentes, sino también a los estudiantes, quienes pueden sentirse desconectados y desmotivados, lo que repercute negativamente en su rendimiento académico.

Pero, además, la alienación también puede manifestarse en la percepción de los estudiantes sobre su propia capacidad para influir en su aprendizaje. La falta de control sobre su entorno educativo virtual puede llevar a una sensación de impotencia, donde los estudiantes sienten que sus voces no son escuchadas realmente. Al decir de Koutsogiannopoulou y Manousou (2024), esto es especialmente evidente cuando se implementan políticas educativas sin consultar a los principales interesados. Aunado a lo anterior, la falta de proximidad y control durante la enseñanza virtual puede llevar a una experiencia educativa superficial, lo que resalta cómo la alienación afecta el aprendizaje individual y erosiona el sentido de comunidad entre estudiantes y docentes.

Desde las coordenadas de la microfísica del poder, de Foucault (1980), por lo general el poder juega un papel fundamental en la distribución de recursos y oportunidades dentro del contexto educativo, tradicional y hoy en día virtual. Las decisiones sobre qué tecnologías implementar y cómo se distribuyen los recursos educativos están influenciadas por dinámicas de poder que pueden perpetuar desigualdades existentes. Pérez-Alia y Perochena-González (2023), argumentan que las estructuras de poder dentro del sistema educativo determinan quién tiene acceso a recursos tecnológicos y quién queda excluido. Esto significa que los estudiantes provenientes de contextos socioeconómicos desfavorecidos pueden enfrentar barreras adicionales para acceder a una educación de calidad, exacerbando en el proceso las desigualdades materiales existentes en una sociedad determinada.

Asimismo, el poder se manifiesta en la forma en que se toman decisiones sobre el currículo y las metodologías utilizadas en la educación a distancia. Las instituciones educativas pueden favorecer enfoques que alineen con intereses comerciales o políticos, dejando de lado las necesidades reales de los estudiantes. Interpretando a Nussbaum (2012), la lucha por el control sobre el currículo refleja luchas más amplias por el poder dentro de la sociedad. Este control puede limitar las capacidades

humanas de ser y hacer, de innovación pedagógica y, por lo tanto, perpetuar modelos educativos obsoletos al servicio de ciertas elites tradicionales contrarias al goce y disfrute general de los derechos humanos.

En síntesis, las problemáticas inherentes a la educación a distancia desde la perspectiva crítica revelan profundas implicaciones políticas, filosóficas e ideológicas. Las ideologías dominantes influyen significativamente en las políticas educativas, afectando tanto el acceso como la calidad del aprendizaje. La alienación resultante del uso inadecuado de tecnologías limita las interacciones significativas entre estudiantes y docentes, mientras que las dinámicas asimétricas de poder determinan quién tiene acceso a recursos educativos esenciales y quienes no tienen (Foucault, 1980). Para abordar estos desafíos, es necesario adoptar una perspectiva crítica e interdisciplinaria que cuestione y transforme estas estructuras hegemónicas para promover una educación más equitativa e inclusiva.

CONCLUSIONES Y RECOMENDACIONES

En líneas generales, la educación a distancia mediada tecnológicamente ha traído consigo varios asuntos problemáticos que impactan de forma material y cognitiva, tanto a estudiantes como a docentes. Uno de los principales problemas es la brecha digital, que se manifiesta en la desigualdad de acceso a dispositivos y conexión a internet, lo que deja a muchos estudiantes del sur global en desventaja. Además, la falta de formación adecuada para el uso de herramientas tecnológicas por parte de los docentes contribuye a una experiencia educativa deficiente, donde se espera que los educadores se adapten sin el apoyo necesario, tal como destacan Klopov, et al (2023). Para abordar estos problemas, es fundamental implementar programas de capacitación continua para docentes y asegurar que todos los estudiantes tengan acceso equitativo a la tecnología, quizás mediante subsidios o iniciativas comunitarias que proporcionen recursos tecnológicos.

Otro asunto crítico es la alienación que puede surgir en un entorno virtual, donde la interacción humana se ve reducida. Los estudiantes pueden sentirse desconectados y menos motivados, lo que afecta su rendimiento académico. La falta de infraestructura adecuada también juega un papel crucial; muchas instituciones educativas en el sur global no cuentan con los recursos necesarios para garantizar un aprendizaje efectivo en línea. Para resolver esto, se podría fomentar la creación de comunidades de aprendizaje en línea que promuevan la colaboración y el diálogo entre estudiantes y docentes, así como invertir en infraestructura tecnológica para facilitar el acceso y mejorar la calidad del aprendizaje.

Desde la perspectiva de la teoría crítica de la sociedad, tal como la exponen Habermas (1999) y Freire (1970), entre otros, resulta esencial analizar cómo influyen conceptos como ideología, alienación y poder en los contextos de aprendizaje a distancia, lo que se puede hacer perfectamente desde el enfoque del análisis crítico del discurso. En este contexto, la ideología dominante puede perpetuar desigualdades al favorecer ciertos métodos de enseñanza que no consideran las necesidades diversas de los estudiantes. En este hilo conductor, la alienación, tal como sostiene Lander (2008), se manifiesta cuando los estudiantes no ven relevancia en lo que aprenden, sintiéndose como meros receptores pasivos de información vacía. En este orden de ideas, el poder se distribuye desigualmente; aquellos con más recursos tecnológicos tienen ventajas significativas sobre sus pares menos favorecidos, lo que genera un ciclo de exclusión y marginación.

Más precisamente, la alienación también puede ser exacerbada por el uso ineficaz de las TIC. Si los docentes no están capacitados para integrar estas herramientas en su enseñanza, el aprendizaje puede volverse mecánico y poco significativo. Esto resalta en cada momento la necesidad de una reflexión crítica y filosófica sobre las metodologías utilizadas en entornos virtuales y cómo estas pueden ser transformadas para fomentar un aprendizaje más participativo y centrado en el estudiante. Por estas razones, la teoría crítica invita a cuestionar estas dinámicas de saber y poder y, al mismo tiempo, a buscar formas más inclusivas y equitativas de enseñanza-aprendizaje.

Los autores de esta reflexión piensan que, para investigadores críticos interesados en este tema, es recomendable que enfoquen sus estudios en las experiencias vividas por los estudiantes y docentes en contextos de educación a distancia, lo que remite sin duda a mirada fenomenológicas y hermenéuticas (Martinez, 2009). Por lo tanto, es importante explorar cómo las prácticas educativas pueden ser transformadas para abordar las desigualdades existentes y promover un aprendizaje más inclusivo. Asimismo, deben considerar metodologías participativas que involucren a todos los actores educativos en la creación de soluciones efectivas al servicio de cada comunidad de aprendizaje.

Finalmente, esta investigación puede enfrentar limitaciones relacionadas con el acceso a datos representativos y la variabilidad en las experiencias individuales con la educación a distancia. Las futuras líneas de investigación podrían incluir estudios longitudinales que analicen el impacto a largo plazo de la educación a distancia en diferentes contextos socioeconómicos, así como investigaciones sobre cómo las políticas educativas pueden adaptarse para abordar las necesidades cambiantes del aprendizaje mediado por tecnología. También sería valioso investigar nuevas metodologías pedagógicas que integren tecnologías emergentes y fomenten un aprendizaje auténtico y significativo, sin desvalorar en el proceso a las artes y humanidades.

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Experiencia de colaboración social y pedagógica en la formación de la identidad nacional rusa entre los estudiantes

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Resumen. El artículo analiza la experiencia de colaboración social y pedagógica con la Iglesia Ortodoxa Rusa en la formación de la identidad nacional rusa entre los estudiantes. El estudio se basa en un enfoque interdisciplinario que combina métodos históricos, encuestas y observación participante. Se centra en los eventos organizados conjuntamente con el Departamento Diocesano de Educación Religiosa de 2015 a 2023, donde los estudiantes participaron en diversas actividades para mejorar su desarrollo espiritual y moral. El estudio muestra que el compromiso con la cultura ortodoxa dentro de un marco educativo mejoró la comprensión de los valores nacionales por parte de los estudiantes y fortaleció su identidad nacional rusa. Esta colaboración contribuyó a su educación moral y facilitó el desarrollo de habilidades de liderazgo y colaboración a través de proyectos grupales. Los estudiantes informaron de un mayor sentido de responsabilidad cívica y una conexión más profunda con los valores culturales tradicionales. Esta colaboración enriqueció los resultados educativos al incorporar la educación espiritual y moral a la experiencia universitaria. Contribuyó a su crecimiento personal y a su capacidad para desempeñar funciones profesionales y sociales con una sólida base moral.

Palabras clave: alianza sociopedagógica, identidad cívica, universidad regional, interacción, métodos educativos.

Experience of social and pedagogical partnership in the formation of the Russian national identity among students

Abstract. The article considers the experience of social and pedagogical partnership with the Russian Orthodox Church in forming the Russian national identity among students. The study is based on an interdisciplinary approach combining historical methods, surveys, and participant observation. It focuses on events organized jointly with the Diocesan Department of Religious Education from 2015 to 2023, where students participated in various activities to enhance their spiritual and moral development. The study shows that engagement with the Orthodox culture within an educational framework enhanced students' understanding of national values and strengthened their Russian national identity. This partnership contributed to their moral education and facilitated the development of leadership and collaborative skills through group projects. Students reported a stronger sense of civic responsibility and a deeper connection to traditional cultural values. This partnership enriched educational results by incorporating spiritual and moral education into the university experience. It contributed to their personal growth and ability to navigate professional and social roles with a strong moral foundation.

Key words: socio-pedagogical partnership, civic identity, regional university, interaction, education methods.

INTRODUCTION

The modern socio-cultural situation and the development in Russian society stipulate the need to create a special system of education based on Russia's traditional values. According to scholars, this situation was caused by the sharp decline in state involvement in the educational process at the end of the 20th and beginning of the 21st century and the "inability of educators to teach students to make choices based on deeper meanings since many behavioral patterns, values, and anthropological images they offer are not significant for the youth" (Makhinin, 2020, p. 106). The education devaluation resulted from a value shift (Slobodchikov, Ostapenko, 2017).

Due to the changes and challenges faced by the modern Russian state and society in the first two decades of the 21st century, it has become clear that students need a fundamental understanding of the Russian national identity and the importance of state sovereignty. To this end, the course "Fundamentals of the Russian Statehood" was introduced in the 2023-2024 academic year. This course fosters students' civic and political engagement and promotes the formation of an all-Russian culture, which is vital for every citizen. The educators teaching the "Fundamentals of the Russian Statehood" have been tasked with enhancing the educational impact of the new course through practices aimed at shaping citizens and patriots in Russian society, following the best national traditions passed down through centuries and generations. The changing socio-political landscape brings us back to the roots of forming traditional values in the youth. Having extensive pedagogical experience in higher education, we have noted the significant historical collaboration between the agricultural university and Orthodox institutions in Tyumen.

Interest in the interaction between religious organizations and the state education system in the Russian pedagogical, historical, and political science literature has emerged over the past 30

years due to “the emergence of a new educational space in the late Soviet period with knowledge about religion outside the atheistic context” (Pigoreva, 2017, p. 82). Spiritual and moral education is addressed by P.S. Volkova (2023), L.I. Ukolova (2022), V.I. Dal (2016), S. Zhuzeyev et al. (2024), and V.A. Sukhomlinskii (1990). V.A. Sukhomlinskii (1990) emphasized the need “to engage in the moral education of the child, teach them to empathize with others, and be attentive to those around them” (p. 50). Sukhomlinskii (1990) also claimed that “if a person is taught goodness – taught skillfully, wisely, persistently, and with discipline – the result will be goodness. If taught evil, the result will be evil, and if neither goodness nor evil is taught, evil will still prevail. Morality and spirituality develop at any age, but in early school years, they are absorbed more completely” (p. 87). K.P. Pobedonostsev (2011) considered faith and religion to be the foundation of the state. S.I. Miropolskii (Bolonkina, 2011) and S.A. Rachinskii (Zharov, 2012) believed that the core of public schooling is its connection with the church, advocating for the preservation of national traditions, and opposing the adoption of Western approaches to educating children. K.D. Ushinsky (1974, p. 46) defended the idea of national identity and believed that “only a pedagogical system created by the people or based on national principles has effective power and can raise a true patriot”. L.N. Modzalevsky, a follower of Ushinsky’s idea, advocated for the importance of studying the Russian language (Modzalevskaya, 2016). Methodological issues of the Orthodox culture have been explored by K.A. Desyatov (2016), F.N. Kozyrev (2006), A.N. Makhnin (2020), and S.V. Turchak (2010). G.B. Andreeva and O.A. Nikitina (2019) and R.R. Iskhakova and A.S. Kolcherin (2023) touched upon the interaction between the Russian Orthodox Church and educational institutions of different levels. This shift has transformed state policy and allowed secular educational institutions to cooperate with religious organizations and bring the accumulated experience into scientific discussion. I.V. Korolkova (2012, p. 20) argued that “not only the legacy of the Russian Orthodox Church contains an inexhaustible educational potential unaffected by ideological fluctuations since it is based on unchanging values” but participation in joint events also has a positive impact on young people.

Among the most discussed issues are the prospects and risks of interaction between the state education system and religious organizations in the upbringing of the younger generation, the relationship between the concepts of religion and spirituality, the evolution of state policy regarding religious education in schools and the analysis of regional practices, including in higher education, both in a historical context and in context of modern trends in social partnership (Kozyrev, 2014).

The article aims to study the socio-pedagogical partnership with the Russian Orthodox Church in fostering the Orthodox culture among students of the Northern Trans-Urals State Agrarian University.

MATERIALS AND METHODS

The research is based on an interdisciplinary approach considering socio-pedagogical partnership as an educational process within changing conditions. The research methods included the historical method, the survey method, and observation of students during their participation in joint activities organized by the Diocesan Department of Religious Education and Catechization for secular and religious educational institutions from 2015 to 2023.

A key aspect of the study was observing students on a sightseeing tour to Holy Trinity Men’s Monastery in Tyumen in 2023. During this trip, they engaged with the clergy, observed Orthodox rituals, and reflected on the cultural and religious significance of the monastery.

After the excursion, we conducted a survey to evaluate the participants' experience. The excursion included 25 individuals aged 18-20 years, with six men and 19 women.

The questionnaire also contained questions about visiting Holy Trinity Men's Monastery in Tyumen. 36.8% of the respondents had previously visited the monastery, while 63.2% visited it for the first time.

The survey data were analyzed using descriptive statistics to summarize the responses.

RESULTS

The relationship between the state education system and the Russian Orthodox Church is based on the following principles:

- 1) The principle of productivity implies that projects are practice-oriented and their purposeful activities solve significant practical tasks. The result is a socially significant intellectual product, namely research work by students and educators.
- 2) The principle of pedagogical appropriateness means that the projects are directly related to the future professional activities of veterinary students and veterinary-sanitary experts, whose main mission is linked to the value of compassion. Joint projects comprise the Orthodox values accumulated during the excursion and post-excursion reflections, broaden horizons, and have a clear educational focus.
- 3) The principle of openness and dialogue implies that the project participants (students, educators, and the priest-guide) are engaged in subject-to-subject relationships. Creativity and original ideas are encouraged, and a feedback mechanism is in place. The priest-guide remains open to consultations or discussions and is always ready to provide necessary support.
- 4) The principle of modeling professional and cultural social relationships. Project work occurs within specific time frames with tasks, roles, and deadlines, the analysis and discussion of intermediate and final results, preparation of photo reports, feedback, and research. Group members take on individual and collective responsibility for the project outcomes, manage available resources, etc. Thus, project activities mirror professional and communicative relationships, preparing students for effective work and facilitating their future integration into the profession. Interaction with the priest also enhances social engagement, offers insights into monasticism and Orthodox rituals, and constantly involves them in this type of communication.
- 5) The principle of integration is realized at several key stages of the projects. First, their interdisciplinary nature incorporates knowledge from the history of Orthodoxy, philosophy of religion, local history, Russian iconography, church architecture, and literature. Preparing research papers requires awareness of various scientific fields and effective collaboration. Second, the projects involve active interaction between students and professors who serve as experts at different stages of project work and combine their experience and students' competences. Third, the educational component of the projects addresses the axiological aspects of personality traditionally represented by various forms of education.

The Philotheos Educational Readings are devoted to important moral and ethical issues related to the upbringing of the younger generation and the connection of production, humanism, and benevolence. Between 2015 and 2023, nine round-table discussions were held, with 82 participants

delivering presentations and around 500 people attending as listeners. In recent years, university and school students have been involved in these activities. Clergy members visit the university to engage in discussions. Reflections on these joint activities are expressed through student reviews and essays. Over the past two years (2022 and 2023), students of the Northern Trans-Urals State Agrarian University actively participated in the Student Creativity and Pedagogical Mastery Contest “The Orthodox Culture of Our Region”. They were deeply involved in research focusing on the preservation of rural Orthodox churches, the historical functioning of rural parish schools, and the church’s role in the life of the Tyumen Alexander Real School.

In 2023, a new interaction between the Russian Orthodox Church and the educational institution was implementing educational projects expanding knowledge about Orthodoxy and Orthodox culture in Russia and the Tyumen Region. On the one hand, these educational Orthodox projects provide essential information about the region, its notable figures, and cultural traditions. On the other hand, they have a unique and profound educational impact. This influence is a key factor in forming and developing human personality in its complex and multifaceted nature.

Educational projects are realized through various activities, including excursions, conversations with a priest, photo reports, post-excursion projects, and divergent maps. One of these educational projects was titled “Holy Trinity Men’s Monastery – a Sacred Corner of Siberia”. It aimed to introduce participants to the architecture of Orthodox churches, cathedrals, and monasteries, show them the interior of churches, study the main types of icons and the symbolism of church art and painting, and explore the grounds and décor of the monastery.

Answering the question “What role does religion play in your life?”, 47.4% of the respondents evaluated it as “significant”. 68.4% consider themselves Orthodox Christians. Among them, 26.3% regularly attend Orthodox churches, 57.9% attend them occasionally, and 15.8% do not attend churches.

The results regarding non-affiliation with religion and Orthodoxy were nearly identical: 15.1 and 15.8%, respectively. The remaining respondents had not made up their minds about faith or their attitude toward it.

The results concerning celebrating significant Orthodox dates and events in families. 47.4% of the respondents always celebrate Orthodox holidays with their families; 31.6% do it occasionally; 10.5% celebrate rarely; 5.25% celebrate only if Orthodox holidays coincide with public ones. As for their awareness of Orthodox holidays, the students are most familiar with major celebrations like Easter, Christmas, Epiphany, and Trinity (80%). Lesser-known holidays, such as the Exaltation of the Holy Cross, the Presentation of the Blessed Virgin Mary, the Meeting of the Lord, the Annunciation, the Transfiguration, the Dormition of the Virgin Mary, and Palm Sunday, are recognized by only 20%.

Orthodox holidays have their traditions and rituals. According to 36.8% of the respondents, these traditions and rituals have “a high educational value” because, from the time of the Baptism of Rus to the present day, they have created and continue to create conditions for the unity of the people, fostering an atmosphere of comfort, mutual understanding, and family environment. The most popular traditions and church rituals, recognized by 98.5%, include ice swimming on Epiphany, singing Christmas carols, eating pancakes during Maslenitsa, the Easter kiss, and preparing Easter bread and dyed eggs. Among other traditions and rituals, 14% highlighted Baptism and Matrimony and the Easter tradition of granting free access to church bells: after the service and until evening,

anyone can climb the bell tower and ring the bells. The custom of releasing birds from cages on the Annunciation was mentioned. However, 1.5% reported that they were unfamiliar with Orthodox traditions and rituals because “their parents are atheists and have no interest in this”. 47.4% celebrate all Orthodox holidays with their families, performing rituals and upholding traditions.

It is important to dwell on the students’ knowledge of Orthodox values. The students were asked to select the three most important values from a provided list. The top three Orthodox values were mercy (68.4%), compassion (63.2%), and respect (63.2%). The remaining values were ranked as follows: loyalty (57.9%), striving for good deeds (42.3%), patience (21.1%), spiritual perfection (15.8%), and chastity (10.5%). Goodness, love, duty, family, and homeland did not make it to the top three.

Young people’s interest in Orthodoxy could be sparked by traditions (56%), rituals (20%), Orthodox values (19.6%), and Orthodox education (4.4%). According to 84.2% of the respondents, Orthodoxy helps them find their path in life.

The analysis of their responses leads to the conclusion that the study’s results align with national trends and emphasize the special role of the family in promoting the Orthodox culture among children and young people.

During the excursion, the students were particularly interested in the architecture, icons, iconostasis, meeting monks, learning about the history of the monastery, the landscapes, the relics of saints, the desire to come back, the atmosphere of the monastery, its sanctity, and the sense of mystery. When asked “Which elements of the monastery did you like the most?”, the majority of them answered, “icons and frescoes” (78.5%) and “church architecture” (21.5%).

Participation in such educational projects gives grounds to assert that the project created conditions for embedding Orthodox (eternal) values. Despite the initially negative attitude of some students, these values revealed their potential during a single excursion: through external material images (architecture, icons, and decorations) and especially the priest’s Word. 80% of the students changed their attitude towards the Orthodox religion and culture after visiting the monastery. Among these 80%, 15.8% identified as atheists. The group project activity united the student teams, revealed true leaders, provided direction for further creative and research work, and broadened their understanding of social interactions.

The development of the spiritual and moral culture is a process where students absorb the high spiritual and moral values of existence, determine their spiritual ideals, and strive to achieve them, gaining awareness of profound meanings, self-development, and self-improvement. In this regard, projects encompassing educational and moral activities play a significant role.

CONCLUSION

The historical and modern experience of socio-pedagogical partnership with the Russian Orthodox Church allows us to identify the following methods of fostering the Orthodox culture among university students:

- 1) A key element in socio-pedagogical partnership is the creation of an active environment within the university aimed at immersing students in the Orthodox culture through the study of its history, including its regional aspects and early periods of the educational institution, during

which there was a close connection between secular educational institutions and the Russian Orthodox Church. Reflecting on this immersion in discussions, essays, and research papers helps assess student involvement as satisfactory and confirms that this pedagogical approach fosters a sense of citizenship.

- 2) The development of socio-pedagogical partnership with the department for religious education and catechization through excursions, contests, and conferences increases patriotism and shapes a clear understanding of the Orthodox culture as Russia's leading culture.
- 3) Socio-pedagogical educational activities reproduce professional and communicative relationships, preparing students for effective work activities. This also facilitates their entry into the profession and helps harmonize their interaction with the professional environment. Preparing research papers requires knowledge of various fields of science and the ability to organize collaborative research effectively.

Thus, it is advisable to continue working on this topic. Understanding the Orthodox culture in all its forms and manifestations helps students develop a sense of civic identity through love for their homeland and the surrounding world. In conclusion, higher education can be regarded as the most conducive environment for fostering patriotism and forming the civic stance of students. By using various forms and types of activities, universities expand the cultural space for the self-realization of students and stimulate their creativity.

The study's scientific novelty lies in the systematic exploration of the socio-pedagogical partnership between the Russian Orthodox Church and educational institutions, identifying the forms, means, and methods that contribute to forming the Russian national identity among students.

The research's practical significance is in establishing the connection between the professional sphere and humanism, creating an active environment within the educational institution, and shaping civic identity, patriotism, and civic stance through love for the homeland and the surrounding world.

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Sinergizar el rendimiento académico con la competencia comunicativa y la adopción de tecnología

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Resumen. En el contexto de la educación del siglo XXI, la integración de la tecnología y el desarrollo de la competencia comunicativa son fundamentales para mejorar el rendimiento académico de los estudiantes universitarios. El artículo plantea la relación entre las competencias comunicativas, la adopción de tecnología y el rendimiento académico, centrándose en el papel mediador de la motivación de los estudiantes en la educación superior de Malasia. El objetivo es proporcionar una comprensión integral de cómo estos factores interactúan para influir en los resultados del aprendizaje en un panorama educativo en rápida evolución. El estudio empleó un diseño de investigación cuantitativo para analizar el impacto de la competencia comunicativa, la adopción de tecnología y la mediación de la motivación en el rendimiento académico de 129 estudiantes de una universidad malaya mediante cuestionarios estructurados y análisis de factores confirmatorio (CFA) con Smart PLS 4. Este diseño permite un examen exhaustivo de la relación entre las variables. Los hallazgos indican que tanto la adopción de tecnología como la competencia comunicativa impactan significativamente el rendimiento académico, pero sus efectos se magnifican cuando se combinan con altos niveles de motivación de los estudiantes. Los datos revelan que los estudiantes que utilizan eficazmente herramientas y plataformas digitales tienden a obtener mejores resultados académicos, siempre que también posean fuertes habilidades comunicativas que faciliten la interacción efectiva y el intercambio de conocimientos.

Palabras clave: rendimiento académico, competencia comunicativa, tecnología, motivación, educación superior.

Synergizing academic achievement with communicative competence and technology adoption

Abstract. In the context of twenty-first century education, the integration of technology and the development of communicative competence are essential to improve the academic performance of university students. The article discusses the relationship between communicative competence, technology adoption, and academic performance, focusing on the mediating role of student motivation in Malaysian higher education. The goal is to provide a comprehensive understanding of how these factors interact to influence learning outcomes in a rapidly evolving educational landscape. The study employed a quantitative research design to analyze the impact of communicative competence, technology adoption, and motivation mediation on the academic performance of 129 students at a Malaysian university using structured questionnaires and confirmatory factor analysis (CFA) with Smart PLS 4. This design allows for a thorough examination of the relationship between variables. The findings indicate that both technology adoption and communicative competence significantly impact academic performance, but their effects are magnified when combined with high levels of student motivation. The data reveal that students who effectively use digital tools and platforms tend to obtain better academic results, provided that they also possess strong communication skills that facilitate effective interaction and knowledge sharing.

Keywords: academic performance, communicative competence, technology, motivation, higher education.

INTRODUCTION

Academic achievement of university undergraduates in the past centuries differ from those in the 21st century. Academic achievement in the 21st century depends a lot on mastering the 21st century digital knowledge and competencies (James, Talin & Bikar, 2022) that are complex, cross-disciplinary and are much more demanding than rote memorization-based skills (Saavedra & Opfer, 2012).

To compete and to achieve academically, university undergraduates in the 21st-century are expected to be able to communicate well with others, acquire new skills and information independently, and adapt to rapidly changing conditions (Lavi et al., 2021; Gewertz, 2008) and concept mapping strategies (Manas, 2023). Malaysia being a developing country has always aimed to produce students who are not only well balanced, but also competent communicators (MOE, 2014). Since 21st century education is inseparable from technology, like it or not, university undergraduates who want to obtain better results must master the platform used (Wardoyo et al., 2021).

Apart from communicative competence and technology adoption, motivation in digital education has been receiving attention in recent years (Li & Tsai, 2017; Kyewski & Kramer, 2018; Özhan & Kocadere, 2020) since students have the tendency to participate less (Kyewski & Krämer, 2018) and the alarming completion and dropout rates (Xavier & Meneses, 2020; Lee, Choi, & Kim, 2013; Park & Choi, 2009). Murday et al. (2008) study concluded that keeping motivation at a desired level is tough in online courses.

As there are various factors influencing academic achievement, it is crucial to understand how the communicative competence and technology adoption influence academic achievement while motivation mediates these among undergraduates in Malaysia.

LITERATURE REVIEW

Academic achievement is a multi-faceted, complex equation. It is the barometer of students' competence (Idris et al., 2020; Yağci & Çevik, 2019; Kleijn, Ploeg & Topman, 1994). It measures the knowledge, skills and abilities gained by the students (Sanchez et al., 2021). However, in recent years, low academic achievement has been observed among various university undergraduates across the globe (Chowdhury, Rahman. & McCray, 2024; Manas, 2023; Tadese, Yeshaneh & Mulu, 2022; Realyvásquez-Vargas et al., 2020; Adnan & Anwar, 2020; Wan Maziah et al., 2019; Yigermal, 2017). This is caused by a variety of determinants. This study aims to contribute to the investigation of low academic achievement by looking into determinants like communicative competence, technology adoption and motivation.

Empirically, many of the researchers in the world applied the GPA to assess the academic achievement of the students (Tadese, 2022; Zheng & Mustapha, 2022; Jan et al., 2020; Steinmayr et al., 2014; Al-Rofo, 2010; Hijaz & Naqvi, 2006; Applegate & Daly, 2006; Stephan & Schaban, 2002; Naser & Peel, 1998). GPA is one of the best predictors of college achievement in academic activities (Moore & Shulock, 2009). The supremacy of GPA among other measures may be attributed to the readily and conveniently available data about students' achievement in HEIs.

Communicative Competence

Communicative competence refers to the syntactic, morphological, phonological, that is, linguistic knowledge of the language user as well as the social, cultural, discourse and strategic knowledge of how and when to use the language appropriately (Geçkin, 2022).

Many previous studies have investigated communicative competence and have proposed it as an important predictor of academic achievement (Bo et al., 2023; Al Awaji et al., 2022; Martirosyan et al., 2015; Opoola & Fatiloro, 2014; Othman & Nordin, 2013; Yen & Kuzma, 2009; Light et al., 1987).

Communicative competence is measured using various standardized test scores. MUET is a test of English language proficiency that is used specifically in Malaysia and is required for admission to many Malaysian universities. MUET assesses the ability of test-takers to use English effectively for academic purposes and includes a variety of tasks, including listening, speaking, reading, and writing (Baharum et al., 2021). In Malaysia, several studies demonstrated the significant relationship between MUET scores and academic achievement (Malik et al., 2022; Baharum et al., 2021; Hamid, Ismail & Tapsir, 2019; Krishnan, Yaacob & Veloo, 2019; Buniyamin, Kassim & Mat, 2015; Othman & Nordin, 2013; Nopiah et al., 2011). All these studies engaged MUET as a common indicator of academic achievement. By collecting data from 300 undergraduates from four public universities in Malaysia, Malik et al. (2022) discovered significant effect of MUET on academic achievement (GPA).

Technology Adoption

Technology adoption describes how users adopt new technologies, influenced by a variety of factors, such as perceived usefulness and ease of use (Kirwa & Zhiyong, 2020). The successful in-

tegration of new technology into an organization is referred to as technology adoption. Adoption entails more than simply using technology. When new technology is adopted, it will be employed to its maximum capacity and to reap the benefits of the new system.

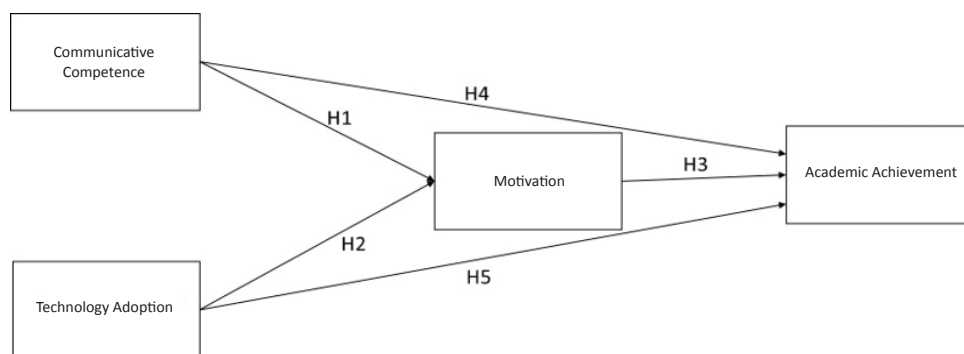
The Technology Acceptance Model (TAM) is a theoretical framework that has been used to explain and predict the adoption and use of technology in various settings, including education. TAM, as the first step of technology adoption, is an attitude towards technology, and it is influenced by various factors. TAM proposes that two key factors, perceived usefulness and perceived ease of use, influence a person's intention to use technology and ultimately, their actual use of technology (Davis, 1989). In addition, perceived usefulness (PU) and perceived ease of use (PEU) are key factors that directly and indirectly boost academic achievement (Marangunić & Granić, 2015).

Motivation

Motivation can be defined as a need, a drive supported by expectations, goals, and emotions. Intrinsic motivation means that the student takes a new course just for its pleasure, because it is considered rewarding and motivating in itself. Extrinsic motivation means that the learning activity is carried out for external activities, such as receiving recognition, a certificate, a good grade or avoiding negative situations such as a reprimand (Capone & Lepore, 2022).

Motivation is a significant predictor of academic achievement (Steinmayr, et. al., 2019). Students who are highly motivated to learn and achieve tend to perform better academically than those who lack motivation. Increasing students' motivation is one of the pedagogical objectives in higher education. A past study suggested that students with higher motivation would actively engage in the learning process and were likely to obtain good learning outcomes (Foong et al., 2021). Students who are highly motivated are more likely to have higher academic achievement (Høigaard et al., 2015; SuárezÁlvarez et al., 2014).

Figure 1. Conceptual Framework



METHODOLOGY

The study employed a quantitative research design to synergize the impact of communicative competence and technology adoption on academic achievement among undergraduates. Also, the role of motivation in mediating the relationship was analyzed. The study involved a total of 129 undergraduate students, aged 18 to 24, from Malaysian university. Participants were selected using random sampling from a population of undergraduate students. Eligibility criteria included being full-time students and actively using online learning for at least one year.

The study utilized a structured questionnaire consisting of 69 items divided into three key areas: communicative competence, technology adoption, and motivation. The communicative competence section comprised 35 questions designed to assess participants' ability to effectively use language in various contexts. Technology adoption was measured using 10 questions that focused on perceived usefulness and perceived ease of use. Lastly, the motivation section included 24 questions aimed at evaluating students' intrinsic and extrinsic motivation toward academic and technological engagement. The questionnaire was carefully designed to ensure clarity and relevance, with responses collected using a 5-point Likert scale ranging from "strongly disagree" to "strongly agree."

The data were analyzed using second-order confirmatory factor analysis (CFA) with Smart PLS 4 to assess the relationships between various factors influencing academic achievement in online education contexts. Smart PLS 4, a partial least squares structural equation modeling (PLS-SEM) tool, was chosen for its ability to handle complex models and small sample sizes. The analysis focused on the three primary constructs of communicative competence, technology adoption, and motivation, all of which were modeled as second-order latent variables. By utilizing this advanced statistical technique, the study aimed to understand both the direct and indirect effects of these variables on academic achievement. The results provided insights into the strength of the relationships between the constructs and their contributions to students' academic achievement in an online learning environment.

ANALYSIS AND RESULTS

The data analysis and results present the details of the data analysis. PLS-SEM analysis that includes the assessment of Measurement and Structural Model. The measurement model establishes the reliability and validity of the construct. The structural model ascertains the significance of hypothesized relationships. Different hypotheses were proposed to evaluate the relationship of predictors on the outcome.

H1. Communicative competence positively and significantly influences motivation

H2. Technology adoption positively and significantly influences motivation

H3. Motivation positively and significantly influences academic achievement/GPA

H4. Motivation mediates the relationship between communicative competence and academic achievement/GPA

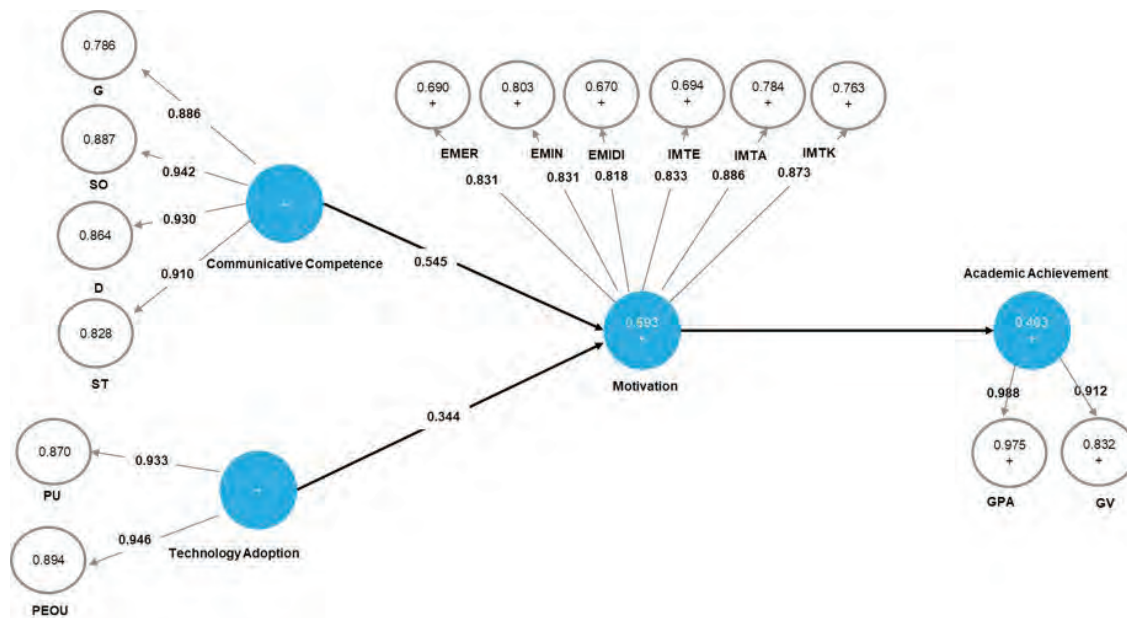
H5. Motivation mediates the relationship between technology adoption and academic achievement/GPA

Measurement Model

The quality of the constructs in the study is assessed based on the evaluation of the measurement model. The assessment of the quality criteria starts with evaluation of the factor loading which is followed by establishing the construct reliability and construct validity.

Factor loadings

Factor loading refers to the "the extent to which each of the items in the correlation matrix correlates with the given principal component, Factor loadings can range from - to +1.0, with higher

Figure 2. Measurement model for lower order construct

absolute values indicating a higher correlation of the item with the underlying factor” (Pett et al., 2003). None of the item in these study had factor loading less than the recommended value of 0.5 (Hair et al., 2016). Hence, no items were further removed.

Indicator Multicollinearity

Variance Inflation Factor (VIF) statistic is utilized to assess multicollinearity in the indicators (Fornell & Bookstein, 1982). According to Hair et al (2016) multicollinearity is not a serious issue if the value for VIF is below 5. Table 1 presents the VIF values for the indicators in the study and reveals that VIF for each indicator is below the recommended threshold.

Low multicollinearity in regression analysis offers several key benefits that enhance the reliability and accuracy of the model. One of the primary advantages is stable estimates, where regression coefficients remain more consistent and are less sensitive to changes in the model. This stability is crucial for ensuring that small variations in the data or model structure do not lead to large fluctuations in the coefficients, making the results more trustworthy.

Another benefit is accurate significance tests. When multicollinearity is low, the tests for determining the significance of individual predictors are more reliable. This allows researchers to confidently assess the unique contribution of each variable, leading to a clearer understanding of their individual effects on the outcome variable. Alongside this, the model benefits from lower standard errors, as the standard errors of the regression coefficients are not inflated by shared variance among predictors. This contributes to more precise estimates, increasing the overall accuracy of the results.

Finally, low multicollinearity leads to clearer interpretation of the model. Since the predictors share less variance with each other, it becomes easier to understand the distinct impact of each variable on the dependent variable. This clarity is essential for deriving meaningful insights from the model. By maintaining low multicollinearity, the regression analysis produces more reliable, interpretable, and insightful results, providing a solid foundation for understanding the relationships between the predictors and the outcome variable.

TABLE 1. Multicollinearity Statistics (VIF) for indicators

Indicators	VIF	Indicators	VIF	Indicators	VIF
D1	2.069	EMIN2	3.633	GP7	2.777
D1	2.825	EMIN2	2.601	GP7	2.642
D2	2.168	EMIN3	3.323	GP8	3.532
D2	3.587	EMIN3	2.147	GP8	2.728
D3	4.891	EMIN4	3.305	GV1	1.754
D3	2.625	EMIN4	4.849	GV1	2.34
D4	3.454	G1	2.965	GV2	2.745
D4	2.507	G1	2.154	GV2	2.161
D5	3.382	G2	2.388	GV3	4.622
D5	2.133	G2	3.587	GV3	2.481
EMER1	2.492	G3	2.642	IMTA1	2.81
EMER1	1.455	G3	4.537	IMTA1	1.917
EMER2	4.222	G4	3.766	IMTA2	2.014
EMER2	3.187	G4	2.328	IMTA2	3.666
EMER3	4.14	G5	4.073	IMTA3	3.733
EMER3	2.62	G5	2.992	IMTA3	2.556
EMER4	3.253	G6	3.85	IMTA4	3.365
EMER4	4.227	G6	3.039	IMTA4	1.714
EMIDI1	1.791	GP2	4.122	IMTE1	1.554
EMIDI1	2.414	GP2	3.927	IMTE1	2.735
EMIDI2	2.393	GP3	3.975	IMTE2	3.053
EMIDI2	4.407	GP3	3.892	IMTE2	2.255
EMIDI3	1.892	GP4	4.934	IMTE3	2.986
EMIDI3	2.894	GP4	4.021	IMTE3	2.393
EMIDI4	1.877	GP5	4.136	IMTE4	2.813
EMIDI4	2.631	GP5	3.645	IMTE4	1.567
EMIN1	2.271	GP6	3.259	IMTK1	2.906
EMIN1	3.383	GP6	3.156	IMTK1	2.168
IMTK2	2.842	PU4	2.375	SO9	2.512
IMTK2	1.982	PU4	2.661	SO9	3.672
IMTK3	1.563	PU5	2.5	ST1	2.646
IMTK3	2.828	PU5	3.453	ST1	2.093
IMTK4	1.843	SO1	2.831	ST2	2.746
IMTK4	2.996	SO1	3.872	ST2	4.196

Table 1. CONTINUATION

Indicators	VIF	Indicators	VIF	Indicators	VIF
PEOU1	2.461	SO10	3.962	ST3	4.009
PEOU1	2.6	SO10	4.729	ST3	2.772
PEOU2	3.724	SO2	4.026	GP1	3.58
PEOU2	3.474	SO2	2.418	GP1	3.946
PEOU3	2.766	SO3	4.412		
PEOU3	2.201	SO3	3.382		
PEOU4	1.486	SO4	4.075		
PEOU4	1.599	SO4	2.44		
PEOU5	2.452	SO5	2.875		
PEOU5	3.073	SO5	2.132		
PU1	2.675	SO6	4.968		
PU1	2.627	SO6	2.49		
PU2	3.905	SO7	2.481		
PU2	3.528	SO7	2.28		
PU3	2.703	SO8	2.998		
PU3	2.835	SO8	2.241		

According to Mark (1996), "Reliability is defined as the extent to which a measuring instrument is stable and consistent. The essence of reliability is repeatability. If it is administered over and over again, it will yield the same results." In research, reliability is a critical aspect of ensuring that the measurements taken are not only accurate but can be consistently replicated under similar conditions. This repeatability is essential for the validity of any scientific or statistical analysis, as it assures that the data collected through the instrument is dependable over time.

Two of the most commonly used methods for assessing and establishing reliability in the field of quantitative research are Cronbach's Alpha and Composite Reliability (CR). Cronbach's Alpha is a measure of internal consistency, which indicates how well a set of items measures a single unidimensional latent construct. A higher value of Cronbach's Alpha suggests that the items within a scale are highly correlated and provide a reliable measure of the underlying construct. Composite Reliability, on the other hand, is an alternative reliability measure that considers the overall reliability of a latent variable in relation to the measured items and is often preferred in structural equation modeling (SEM) contexts.

The results of both Cronbach's Alpha and Composite Reliability for this study are presented in Table 2. The values of Cronbach's Alpha ranged from 0.808 to 0.974, indicating a high level of internal consistency across the constructs measured. Similarly, the Composite Reliability statistics ranged from 0.874 to 0.976, further affirming the consistency and stability of the measurement model. Both of these reliability indicators surpass the widely accepted threshold of 0.70 (Hair et al.,

2011), which is considered the minimum level required to establish acceptable reliability in social science research.

Given that both Cronbach's Alpha and Composite Reliability values exceed the required threshold, it can be concluded that the constructs used in this study are reliable. The high reliability scores ensure that the measurement instrument is capable of producing consistent results, which strengthens the overall credibility of the data and the findings derived from the analysis. Therefore, construct reliability is well-established, providing a solid foundation for the subsequent phases of data interpretation and analysis.

TABLE 2. Construct Reliability Analysis (Cronbach Alpha and Composite Reliability)

Construct Validity

	Cronbach's alpha	Composite reliability
Communicative Competence	0.974	0.976
D	0.93	0.947
EMER	0.862	0.908
EMIDI	0.825	0.884
EMIN	0.891	0.925
G	0.916	0.935
GP	0.944	0.953
GPA	0.953	0.959
GV	0.843	0.905
IMTA	0.846	0.897
IMTE	0.808	0.874
IMTK	0.839	0.892
Motivation	0.956	0.96
PEOU	0.878	0.912
PU	0.916	0.937
SO	0.953	0.96
ST	0.919	0.949
Technology Adoption	0.933	0.944

In statistical analysis using PLS-SEM, construct validity is established when there is convergent validity and discriminant validity.

Convergent Validity

“Convergent validity is the degree to which multiple attempts to measure the same concept are in agreement. The idea is that two or more measure of the same thing should vary highly if they are valid measures of the concept” (Bagozzi et al, 1991). When the AVE value is greater than or equal to the recommended value of 0.50, items coverage to measure the underlying construct and hence

convergent validity is established (Fornell & Larcker, 1981). Convergent validity results based on the AVE statistics in the current study show that all the constructs have an AVE greater than 0.50. Hence, convergent validity is established. Table 3 shows the AVE Value for each of the constructs.

TABLE 3. Construct Convergent Validity (AVE)

Average variance extracted (AVE)	Communication Competence
	0.628
D	0.782
EMER	0.714
EMIDI	0.656
EMIN	0.754
G	0.706
GP	0.719
GPA	0.683
GV	0.761
IMTA	0.685
IMTE	0.634
IMTK	0.675
Motivation	0.503
PEOU	0.678
PU	0.748
SO	0.706
ST	0.860
Technology Adoption	0.629

Discriminant Validity

“Discriminant validity is the degree to which measures of different concepts are distinct. The notion is that if two or more concepts are unique, then valid measures of each should correlate to highly” (Bagozzi et al, 1991).

Fornell and Larcker Criterion

According to Fornell and larcker (1981) criterion, discriminant validity is established when the square root of AVE for a construct is greater than its correlation with all other constructs. In this study, square root of AVE (in Bold and Italics) for a construct was found greater than its correlation with other constructs. Hence, providing strong support for establishment of discriminant validity.

Cross Loadings

Cross loadings help assess if an item belonging to particular constructs load strongly onto its own parent construct instead of other constructs in the study. The results show that factor loading of all the items is stronger on the underlying construct to which they belong instead of the other

constructs in the study (Wasko & Faraj, 2005). Hence, based on the evaluation of cross loadings, discriminant validity is attained.

Heterotrait-Monotrait Ratio (HTMT)

HTMT is and based on the estimation of the correlation between the constructs. Discriminant validity is established based on the HTMT ratio. However, the threshold for HTMT has been debated in existing literature, Kline (2011) suggested a threshold of 0.85 or less, while Theo et al (2008) recommend a liberal threshold of 0.90 or less. The HTMT results in this study indicates that HTMT ratio for required threshold of 0.90.

These higher order constructs were also validated as part of the measurement model assessment. Each of these constructs was assessed for reliability and convergent validity. Furthermore, the higher order construct was tested for discriminant validity with lower order constructs in the study as recommended by Sarstedt et al. (2019). The results for reliability and validity of the higher order constructs showed that both reliability and validity was established. The reliability and convergent validity for all other constructs were established as the value for reliability is > 0.70 and the AVE is greater than 0.50 respectively (Table 4). Further to assessment of reliability and validity, discriminant validity of the higher order construct was also assessed. The results of Fornell and Larcker (1981) criterion shows that square-root of AVE of the constructs is higher than its correlation with all other constructs (Table 5) whereas HTMT is also lower than 0.90 (Table 6).

TABLE 4. Higher Order Construct Reliability and Convergent Validity

	Cronbach's alpha	Composite reliability	Average variance extracted (AVE)
Communicative Competence	0.94	0.957	0.848
GPA	0.911	0.957	0.918
Motivation	0.927	0.943	0.734
Technology Adoption	0.867	0.938	0.883

TABLE 5. Fornell and Larcker (1981) Criterion – Higher Order Discriminant Validity

	Communicative Competence	GPA	Motivation	Technology Adoption
Communicative Competence				
GPA	0.856			
Motivation	0.743	0.665		
Technology Adoption	0.515	0.46	0.669	

TABLE 6. HTMT – Higher Order Discriminant Validity

	Communicative Competence	GPA	Motivation	Technology Adoption
Communicative Competence	0.921			
GPA	0.885	0.958		
Motivation	0.701	0.623	0.857	
Technology Adoption	0.466	0.41	0.601	0.939

Subsequently, to confirm the proposed hypothesis, assessment of the hypothesized relationship was carried out. The results revealed that Communicative Competence has significantly influenced Motivation on OP ($b = 0.538$, $t = 6.946$, $p = 0.000$). Technology Adoption has significantly influenced Motivation on OP ($b = 0.350$, $t = 4.725$, $p = 0.000$). Motivation has significantly influenced Academic Achievement on OP ($b = 0.623$, $t = 11.238$, $p = 0.000$). Therefore, H1, H2 and H3 were supported. H1 Communicative Competence positively and significantly influences Motivation. H2 Technology Adoption positively and significantly influences Motivation. H3 Motivation positively and significantly influences GPA.

This finding indicates that higher levels of Communicative Competence are strongly associated with increased Motivation. The result underscores the importance of effective communication skills in enhancing students' motivational levels, which could be attributed to the confidence and engagement that competent communicators often exhibit. The result also highlights the role of Technology Adoption in fostering Motivation, possibly by making learning more interactive and engaging, thus reinforcing the value of integrating technology into educational practices. In addition, this finding aligns with existing literature suggesting that motivated students are more likely to achieve higher academic performance, as they are more likely to engage with learning materials and put in the necessary effort to excel. The significant relationships identified in this study emphasize the importance of fostering Communicative Competence and encouraging Technology Adoption to enhance Motivation and, consequently, Academic Achievement. Educational institutions and instructors might consider incorporating strategies that develop communication skills and integrate technology to boost student motivation and improve academic outcomes. Additionally, these results suggest that interventions aimed at increasing Motivation could be effective in enhancing students' academic achievement.

TABLE 7. Direct Relationship Results

	Original sample (O)	Standard deviation	T statistics	p values
H1. CC -> M	0.538	0.077	6.946	0
H2. T A -> M	0.35	0.074	4.725	0
H3. M -> GPA	0.623	0.055	11.238	0

For the Mediation Analysis, the results (Table 8) revealed significant ($p < 0.05$) partial mediating roles of motivation (H4: $b = 4.526$, $p = 0.000$). The total effect of Communicative Competence on GPA was significant ($b = 6.946$, $p = 0.000$), with the inclusion of the mediator, the direct effect was still significant ($b = 5.073$, $p = 0.000$). Also, the results (see Table 8) revealed significant ($p <$

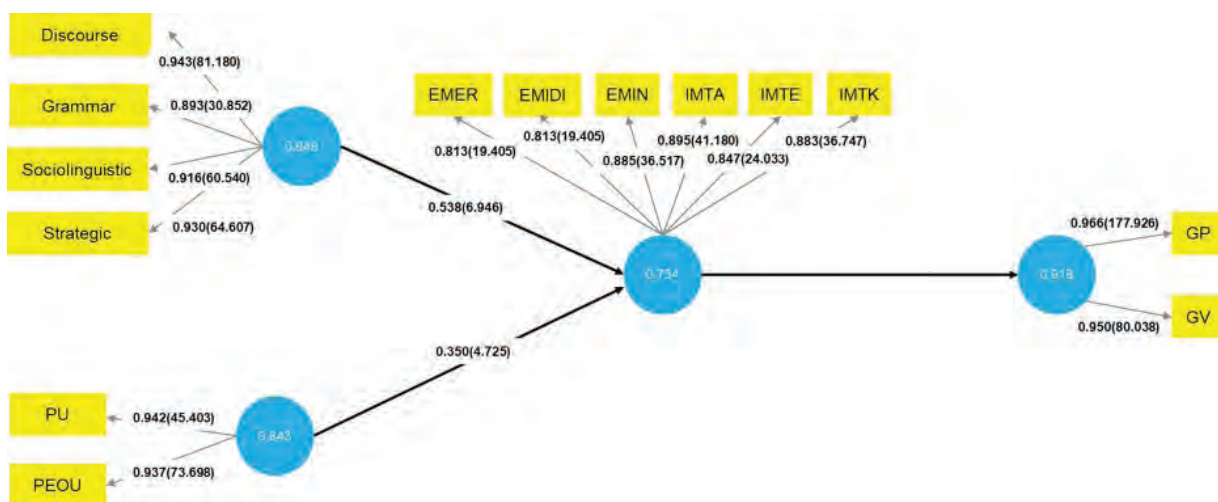
0.05) partial mediating roles of motivation (H4: $b = 5.073$, $p = 0.000$). The total effect of Technology Adoption on GPA was significant ($b = 4.725$, $p = 0.000$), with the inclusion of the mediator, the direct effect was still significant ($b = 4.526$, $p = 0.000$). Therefore, H4 and H5 were validated. H4 Motivation mediates the relationship between Communication Competence and GPA. H5 Motivation mediates the relationship between Technology Adoption and GPA.

These findings confirm that Motivation is a significant mediator in both contexts, enhancing our understanding of how Communicative Competence and Technology Adoption influence Academic Achievement. The significant mediating role of Motivation suggests that interventions aimed at improving students' Motivational levels could enhance the impact of Communicative Competence and Technology Adoption on Academic Achievement. Educational programs and strategies that foster both Communication Skills and Technological Engagement should also consider ways to boost Motivation, as it plays a crucial role in achieving better academic outcomes. Overall, these results emphasize the importance of Motivation in educational contexts and provide a deeper understanding of the mechanisms through which Communicative Competence and Technology Adoption affect Academic Achievement. Future research could further explore additional factors that may influence this mediation process and test interventions designed to enhance Motivation as a pathway to improve academic success.

TABLE 8. Mediation Relationship Results

	Total Effect		Direct Effect			Indirect Effects	
	Coefficient	p-value	Coefficient	p-value		Coefficient	p-value
CC->GPA	6.946	0	5.073	0	H4. CC->M -> GPA	4.526	0
TA->GPA	4.725	0	4.526	0	H5. TA-> M -> GPA	5.073	0

Figure 3. Measurement Model Higher Order Constructs.



The structural model results further confirm the support for the proposed hypotheses. The positive and significant influence of Communicative Competence on Motivation (Hypothesis 1) and the positive and significant influence of Technology Adoption on Motivation (Hypothesis 2) are evident. Additionally, the positive and significant influence of Motivation on GPA (Hypothesis 3) underscores the critical role of Motivation in Academic Achievement. Moreover, the mediating role of Motivation in the relationship between Communicative Competence and GPA (Hypothesis 4) and between Technology Adoption and GPA (Hypothesis 5) is supported by the data. This indicates that Motivation acts as a mediator, enhancing the impact of Communication Competence and Technology Adoption on Academic Achievement. In summary, the data analysis and results chapter provide robust evidence supporting all five hypotheses, thereby validating the theoretical framework and providing insights into the complex relationships between Communication Competence, Technology Adoption, Motivation, and Academic Achievement.

LIMITATIONS

Despite the robust support for the hypotheses, this study has several limitations. Firstly, the cross-sectional nature of the research design limits the ability to draw causal inferences. Longitudinal studies are needed to better understand the directionality of the relationships observed. Secondly, the study relies on self-reported measures, which may introduce bias or inaccuracies in the data. Objective measures or multi-source data could provide more reliable insights. Additionally, the sample may not be representative of all educational contexts, limiting the generalizability of the findings. Future research should aim to include diverse populations and educational settings to enhance the external validity of the results. Finally, while the study explores key variables, it does not account for other potential factors influencing academic achievement, such as socio-economic status or prior academic performance, which could further illuminate the complexities of these relationships.

FURTHER RESEARCH

Future research should consider adopting longitudinal designs to examine how the relationships between Communicative Competence, Technology Adoption, Motivation, and Academic Achievement evolve over time. Investigating these dynamics in different educational contexts and with diverse populations can provide a more comprehensive understanding of the variables' effects. Additionally, incorporating objective measures and multi-source data could enhance the accuracy of findings. Researchers might also explore additional factors that could influence academic achievement, such as socio-economic variables, learning environments, and personal characteristics, to provide a more holistic view of the determinants of academic success. Finally, examining interventions aimed at improving Communicative Competence and Technology Adoption, and their subsequent impact on Motivation and Academic Achievement, could offer practical strategies for enhancing educational outcomes.

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El rol de la educación superior en la formación ciudadana y la conciencia democrática. El caso de Ucrania

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Resumen. El objetivo general del artículo es problematizar filosóficamente el rol de la educación superior en la formación ciudadana, mediante un análisis crítico que aborde las siguientes interrogantes filosóficas: (a) Ontológica: ¿Cuál es la naturaleza del ser ciudadano en el contexto universitario contemporáneo del mundo actual? (b) Epistemológica: ¿Cómo se construye y valida el conocimiento ciudadano en los espacios de educación superior? (c) Filosófico-político: ¿De qué manera la universidad puede transformarse en un espacio social de empoderamiento democrático que supere las lógicas tradicionales de socialización política partidista? Para responder a estas interrogantes, se hizo uso del método hermenéutico, el cual interpela dialógicamente textos y contexto para revelar a la comprensión su verdadero significado y, al mismo tiempo, construir diálogos intertextuales que formulen nuevas o renovadas preguntas sobre el sentido de la formación ciudadana y la conciencia democrática en un mundo signado por el aumento exponencial de la conflictividad política. Con todo, se concluye que, en la Ucrania de postguerra, la democracia enfrentará desafíos complejos, tales como: la necesidad de reconstruir la cohesión social fragmentada por el conflicto, superar los traumas colectivos y, al mismo tiempo, mantener la energía democratizadora que caracterizó la resistencia del Euromaidán.

Palabras clave: educación superior, formación ciudadana, empoderamiento democrático, método hermenéutico, cohesión social.

The role of higher education in citizenship training and democratic awareness. The case of Ukraine

Abstract. The general objective of the article is to philosophically problematize the role of higher education in citizen training, through a critical analysis that addresses the following philosophical questions: (a) Ontological: What is the nature of being a citizen in the contemporary university context of today's world? (b) Epistemological: How is citizen knowledge constructed and validated in higher education spaces? (c) Philosophical-political: How can the university be transformed into a social space of democratic empowerment that overcomes the traditional logics of partisan political socialization? To answer these questions, the hermeneutic method was used, which dialogically interpellated texts and context to reveal to understanding their true meaning and, at the same time, build intertextual dialogues that formulate new or renewed questions about the meaning of citizenship training and democratic awareness in a world marked by the exponential increase of political conflict. All in all, it is concluded that, in post-war Ukraine, democracy will face complex challenges, such as: the need to rebuild social cohesion fragmented by the conflict, to overcome collective traumas and, at the same time, to maintain the democratizing energy that characterized the Euromaidan resistance.

Keywords: higher education, civic education, democratic empowerment, hermeneutic method, social cohesion.

INTRODUCCIÓN

En sentido filosófico, la educación superior constituye un espacio material y simbólico de construcción intersubjetiva de la ciudadanía, donde se modelan los fundamentos epistémicos y axiológicos que posibilitan la emergencia de una conciencia democrática. Este proceso formativo, difícil y complejo, trasciende la mera transmisión de conocimientos, configurándose como un dispositivo sociopolítico que genera las condiciones de posibilidad para la participación crítica y reflexiva en el espacio público, tal como supone el maestro Bobbio (1989). En este contexto, la universidad se constituye así, en un “laboratorio de experimentación democrática”, donde los estudiantes desarrollan capacidades fundamentales para la comprensión y ejercicio de la ciudadanía: respeto, responsabilidad, deliberación y solidaridad, entre otras competencias.

En este orden de ideas, el objetivo general de esta investigación es problematizar filosóficamente el rol de la educación superior en la formación ciudadana, mediante un análisis crítico que aborde las siguientes interrogantes filosóficas: (a) Ontológica: ¿Cuál es la naturaleza del ser ciudadano en el contexto universitario contemporáneo del mundo actual? (b) Epistemológica: ¿Cómo se construye y valida el conocimiento ciudadano en espacios de educación superior? (c) Filosófico-política: ¿De qué manera la universidad puede transformarse en un espacio de empoderamiento democrático que supere las lógicas tradicionales de socialización política partidista? A lo largo de estas reflexiones se proponen algunas respuestas parciales a estas y otras cuestiones similares.

La evidencia empírica y documental sugiere que, en líneas generales, la formación ciudadana en la era digital se configura como un proceso dialéctico complejo de construcción de identidades políticas diferenciales; proceso por lo demás, caracterizado por la capacidad de integrar diversida-

des socioculturales y, al mismo tiempo, desarrollar competencias para la participación activa en espacios públicos virtuales y presenciales (Pino, 2010). Esta formación implica el desarrollo de una conciencia crítica que trasciende los límites institucionales, promoviendo la integración de saberes, experiencias y perspectivas diversas.

Por su parte, al decir de Sartori (2009), la conciencia democrática emerge como un constructo multidimensional que articula valores, prácticas y disposiciones orientadas al reconocimiento de la pluralidad, el diálogo y la participación corresponsable en la construcción de las realidades políticas. Se trata de un proceso de permanente reflexividad que vincula la ciudadanía con los principios fundamentales de la democracia: igualdad, libertad y solidaridad, esto al menos en las sociedades liberales. Por lo tanto, para los autores de estas reflexiones la ciudadanía, en este sentido, no es un estatus estático, sino un ejercicio dinámico de construcción colectiva que encuentra en la universidad su espacio privilegiado de experimentación y realización.

El presente artículo está dividido en 5 secciones: en la primera sección, se presenta el estado del arte; en la segunda, las bases metodológicas de la investigación; por su parte, en la tercera sección, se problematiza en torno a Rol de la educación superior en la formación ciudadana y en la conciencia democrática. Finalmente, en la cuarta se sección, se exponen las conclusiones y recomendaciones del estudio, junto al índice de referencias consultadas en orden alfabético.

Estado del arte

En esta revisión bibliográfica, el primer estudio relevante, por su alcance y significado general, se titula: “Investigación, Ciudadanía y Educación Superior” (Ollarves & Salguero, 2010) destaca la importancia de comprender la universidad como un espacio de generación de ciudadanía, donde se integran dimensiones individuales, relacionales, comunitarias e institucionales. En su discurso, los investigadores enfatizan que la formación ciudadana requiere superar los enfoques tradicionales, promoviendo una pedagogía dialógica que fomente la libertad, la deliberación y la responsabilidad social. Mucho más aun, cuando:

Las universidades como espacio público son por su naturaleza organizaciones que tienen dentro de su misión, visión y valores, la responsabilidad de generar, divulgar y aplicar el conocimiento como proceso y producto social, a fin de dar respuestas al conjunto de necesidades y demandas que subyacen en el orden educativo, social ecológico, cultural o tecnológico. Esto significa, por un lado, que las universidades como sistemas sociales están oteando las posibles tendencias, actitudes y comportamientos que puedan apuntalarse a través de sus miembros, y por la otra parte, revisan la pertinencia de sus procesos organizacionales en sintonía con las realidades circundantes (Ollarves & Salguero, 2010, p. 3).

En el marco de lo que significa la ciudadanía en su sentido contemporáneo, otro estudio clave de la autoría de Pino (2010), el cual analiza la transformación de los modelos de ciudadanía en el contexto contemporáneo, destacando la necesidad de desarrollar competencias cívicas que permitan a los estudiantes participar activamente en la resolución de problemas sociales. Finalmente, la autora propone para el debate académico un modelo teórico-pedagógico que integra valores como tolerancia, solidaridad y compromiso colectivo en la esencia del ser ciudadano. En estrecha relación con este tema, la investigación de Silva, Angarita y Ramírez (2020), profundiza en la dimensión ética de la formación ciudadana, argumentando que la universidad debe comprometerse con el desarrollo de principios fundamentales: respeto, responsabilidad y solidaridad. Esta posición teórica y práctica

considera la ciudadanía como un proyecto educativo que trasciende la mera socialización de conocimientos, constituyéndose, más bien, como un proceso ontológico de transformación subjetiva y social.

Un cuarto estudio consultado de la autoría de Arango y Benjumea (2011), examina la relación entre investigación, ciudadanía y educación superior, destacando el potencial de la universidad como espacio de generación de conocimiento crítico. Los autores argumentan que la producción académica debe orientarse a la comprensión y transformación de las realidades sociales, fomentando una ciudadanía activa y comprometida. Concluyen apostando por la acción dialógica del ejercicio de la ciudadanía, de modo que: “La participación en los debates y las deliberaciones y la formación para que ella se dé de manera efectiva, es garantía de la preservación del espacio público, en el que a su vez se sustenta la democracia” (Arango & Benjumea, 2011, p. 11).

Mas allá de sus particularidades, la literatura consultada converge en señalar la necesidad de reconfigurar la universidad como un laboratorio de experimentación democrática, donde se integren diversas perspectivas ideológicas, se promuevan prácticas dialógicas y se desarrollen competencias para la participación ciudadana. Esta visión implica superar los modelos tradicionales de educación, promoviendo una formación integral que articule dimensiones éticas, políticas y sociales de cara a la democracia.

Finalmente, los estudios analizados coinciden en que la educación superior debe constituirse como un espacio de empoderamiento ciudadano, capaz de formar sujetos críticos, reflexivos y comprometidos con la transformación social. En consecuencia, la universidad se configura, así como un dispositivo primario para la construcción de una democracia participativa, donde la ciudadanía se entiende no como una credencial, sino como un proceso permanente de construcción individual y colectiva, tal como supone Villasmil y Babarykina (2022).

METODOLOGÍA

El diseño metodológico de esta investigación se fundamenta en una perspectiva epistemológica constructivista, que comprende el conocimiento como una construcción intersubjetiva profundamente condicionada por los marcos filosóficos, sociales y culturales de un momento histórico específico (Berrara Morales, 2010). Esta aproximación epistemológica reconoce que la realidad no es un dato objetivo externo, sino un proceso subjetivo de permanente interpretación y significación donde los sujetos participan activamente en la elaboración de sentidos. El conocimiento en general, por tanto, se configura al decir de Martínez (2009), como un producto dialéctico entre las experiencias individuales, los contextos sociohistóricos y los marcos interpretativos disponibles, superando las visiones positivistas que conciben la realidad como una entidad independiente de los sujetos cognoscentes.

Mas específicamente, la investigación se orienta desde una metodología hermenéutica y documental, que interpela dialógicamente los textos y contextos para revelar sus significados profundos. Esta metódica busca comprender la formación ciudadana y la conciencia democrática no como fenómenos estáticos, sino como procesos dinámicos de construcción permanente. En palabras de Gadamer (1993), la hermenéutica permite revelar los sentidos ocultos en los discursos, establecer conexiones intertextuales y generar nuevas comprensiones sobre el rol de la educación superior en la configuración de subjetividades políticas. Se trata de un ejercicio interpretativo que no solo describe,

sino que produce conocimiento mediante la problematización de los sentidos establecidos, promoviendo una relectura crítica y transformadora de la realidad social.

En términos operativos, las etapas de la investigación se estructuraron en cinco momentos primordiales a saber:

- a) Problematización.
- b) Revisión documental.
- c) Análisis hermenéutico.
- d) Interpretación crítica.
- e) Construcción de conclusiones.

Cada etapa responde al sentido del objetivo planteado y permite, por lo tanto, una comprensión integral y multidimensional del fenómeno estudiado. En general, esta metodología privilegia una mirada cualitativa de la realidad que posibilita, en cada momento, la profundidad interpretativa por sobre la extensión cuantitativa, reconociendo la complejidad de los procesos formativos en educación superior.

Por lo demás, conviene explicitar que significan cada una de estas etapas al calor de esta investigación: (a) Problematización: Delimitación del objeto de estudio, formulación de preguntas de investigación y definición de coordenadas conceptuales; (b) Revisión documental: Selección sistemática de fuentes primarias y secundarias, construcción de un corpus documental que integre perspectivas diversas sobre ciudadanía y democracia; (c) Análisis hermenéutico: Despliegue de los sentidos implícitos en los documentos, identificación de núcleos semánticos y reconstrucción de los marcos interpretativos; (d) Interpretación crítica: Diálogo entre los diferentes textos, establecimiento de relaciones y tensiones conceptuales, problematización de los discursos dominantes; (e) Construcción de conclusiones: Síntesis interpretativa, formulación de nuevas preguntas y proyección de horizontes de sentido.

CUADRO 1. Estructura metodológica simplificada de la investigación.



Fuente: elaborado por los autores (2024).

Las principales limitaciones y posibles sesgos de la investigación se centran en: (a) La selección de fuentes, que podría reproducir perspectivas hegemónicas; (b) La interpretación hermenéutica, que está siempre mediada por la subjetividad del investigador; (c) La dificultad para generalizar conclusiones debido al carácter situado del conocimiento; (d) El riesgo de una lectura descontextualizada de los procesos formativos; (e) La potencial reproducción de marcos interpretativos occidentales y eurocéntricos. En su conjunto, estas limitaciones son permanentemente problematizadas mediante un ejercicio de reflexividad que reconoce la parcialidad de toda construcción de conocimiento (Martínez, 2009).

Rol de la educación superior en la formación ciudadana y en la conciencia democrática

La problematización filosófica de la formación ciudadana requiere una comprensión multi-dimensional que integre los niveles ontológico, epistemológico y político, entre otros. Conviene recordar que tal como sostiene Russell (2002), un análisis ontológico interroga sobre la naturaleza del ser ciudadano, explorando sus condiciones existenciales y su modo de ser en el mundo. Por su parte, la perspectiva epistemológica examina cómo se construye y valida el conocimiento ciudadano, identificando los procesos de legitimación y producción de saberes en la universidad (Dancy, 1993). Finalmente, desde la filosofía política, se problematiza la configuración de espacios de empoderamiento democrático que superen las lógicas tradicionales de socialización política (Bobbio, 1989). Estos tres niveles de análisis constituyen un dispositivo crítico para comprender la complejidad de la formación ciudadana en la educación superior contemporánea y actual.

En este sentido, la ontología del ser ciudadano en el contexto universitario actual se configura como una existencia múltiple y compleja, caracterizada por la capacidad de habitar simultáneamente diversos espacios sociales y simbólicos. De modo que, el ciudadano universitario contemporáneo se define por su capacidad de integración crítica, superando las fronteras tradicionales de identidad y pertenencia. En palabras de Egholm, Horbach, Bengtsen y Sarauw (2024), esta condición ontológica implica una permanente reconstrucción de la subjetividad política, donde la universidad se constituye como un espacio de experimentación existencial para el ser y el hacer político e ideológico. En consecuencia, el ser ciudadano ya no se limita a una pertenencia territorial o nacional delimitada, sino que se despliega como una potencialidad de transformación social en un mundo digital.

Simplificando las cosas con fines expositivos, la naturaleza ontológica del ciudadano universitario se caracteriza por su condición dialógica y performativa. Quizá precisamente por estas razones, al decir de GuildHE Research (2016), el ciudadano actual no se trata de un sujeto predeterminado, sino de una potencia en permanente construcción que se realiza así mismo mediante prácticas concretas de participación, deliberación y compromiso social. En este escenario, la universidad se configura como un espacio existencial donde se entrecruzan dialécticamente nuevas formas de ser ciudadano, más allá de las estructuras tradicionales de socialización política. Por lo tanto, esta ontología ciudadana implica una apertura radical a la diferencia, la multiplicidad y la transformación permanente.

Epistemológicamente, la construcción del conocimiento ciudadano en la educación superior se desarrolla mediante procesos de coproducción que desbordan los límites disciplinares tradicionales, al menos así lo supone Patel (2011). En este hilo conductor, el conocimiento ciudadano se valida a través de prácticas dialógicas que integran saberes académicos, experienciales y comunitarios. Hasta el punto de que, en condiciones democráticas, la universidad se constituye como un espacio de intersección epistemológica donde se desestabilizan las jerarquías tradicionales entre conocimiento experto y conocimiento popular.

Aunado a lo anterior, y tal como sostiene Jackson (2016), la validación del conocimiento ciudadano implica el reconocimiento de la pluralidad epistémica, superando los modelos de producción de conocimiento centrados en la objetividad científica tradicional de corte positivista o empirista lógico. De lo que se trata aquí, es de construir “ecologías de saberes” que integren perspectivas teóricas y metodológicas diversas, promoviendo en cada momento una epistemología flexible de la escucha que reconozca la legitimidad de múltiples formas de conocer y comprender la realidad social. Bajo estas coordenadas gnoseológicas, la universidad se transforma así en un espacio de traducción intercultural de conocimientos.

Siguiendo a Ferrater (2004), desde la filosofía política, la universidad puede transformarse en un espacio de empoderamiento democrático mediante la construcción de prácticas pedagógicas, andragógicas y contrahegemónicas. Esta posición implica superar las lógicas de socialización política partidista, promoviendo una formación ciudadana basada en la autonomía, la deliberación crítica y el compromiso ético con la transformación social. La universidad se configura como un dispositivo de resistencia frente a los procesos de despolitización neoliberal tal como suponen Oleksenko, Molodychenko y Shcherbakova (2018).

De cualquier modo, el empoderamiento democrático universitario requiere la construcción de comunidades de práctica que desarrollen capacidades colectivas de agencia política, tal como insiste Nussbaum (2012), en su planetamiento para producir capacidades humanas. Para el criterio general de los autores de esta investigación, de lo que trata, insistamos, es de generar espacios de experimentación democrática donde los estudiantes puedan desarrollar prácticas de autoorganización, deliberación horizontal y compromiso social. Por estas razones, la universidad se constituye como un espacio social de innovación democrática que forma ciudadanos capaces de imaginar y construir alternativas sociales en base a sus propias necesidades individuales y colectivas.

En términos globales, la problematización filosófica de la formación ciudadana revela la complejidad de los procesos de construcción de la subjetividad política en la educación superior. Y es que, sin ninguna duda, la universidad moderna se configura como un espacio de intersección ontológica, epistemológica y política, donde se experimentan nuevas formas de ser, conocer y transformar la realidad social. No obstante, el desafío fundamental consiste en mantener abierta la potencialidad crítica de la formación ciudadana, reconociendo su carácter siempre inacabado y en permanente construcción.

CONCLUSIONES Y RECOMENDACIONES: PENSANDO EN EL CASO DE UCRANIA

La guerra en Ucrania representa más que un conflicto territorial; constituye una lucha paradigmática entre dos modelos civilizatorios radicalmente diferentes. Por un lado, el imperialismo ruso postsoviético encarna un proyecto autoritario, vertical y antidemocrático que busca anular la autonomía ucraniana. Por otro lado, Ucrania simboliza la resistencia democrática, una nación que apuesta por la construcción de una identidad política basada en valores de libertad, pluralismo y participación ciudadana. Esta confrontación trasciende los límites geográficos, configurándose como un conflicto de horizontes existenciales donde se disputan formas de comprender la vida política y social, muy distintas.

En este sentido, la invasión rusa ha revelado la profunda determinación democrática del pueblo ucraniano. La sociedad ucraniana ha demostrado una capacidad de resistencia que va más allá de la defensa territorial, representando una defensa de su proyecto civilizatorio. Por lo tanto, la búsqueda de integración europea no es meramente geopolítica, sino una apuesta existencial por un modelo de sociedad fundado en el reconocimiento de la dignidad humana, la deliberación democrática y la construcción colectiva de horizontes de sentido. En consecuencia, la voluntad ucraniana de pertenecer a la Unión Europea expresa un deseo de transformación social que supera las lógicas de dominación imperial.

Las universidades ucranianas emergen como espacios fundamentales para la reconstrucción nacional, más allá de la mera recuperación infraestructural. Su rol será crucial en la reconfiguración

del tejido social, promoviendo procesos de memoria, reconciliación y construcción de ciudadanía democrática. En este contexto, las instituciones de educación superior se constituirán como laboratorios de innovación social, donde se apreciarán nuevas formas de convivencia, participación y compromiso cívico.

La reconstrucción nacional deberá estar guiada por un modelo civilizatorio democrático que integre los principios de derechos humanos, desarrollo sostenible y participación ciudadana, tal como afirma Nikitenko, et al., (2023). Las universidades actuarán como espacios de transferencia de conocimiento, diseñando programas educativos que aborden los desafíos de la reconstrucción desde una perspectiva integral. De modo que, será fundamental formar profesionales comprometidos con la transformación social, capaces de articular saberes técnicos con compromiso ético y sensibilidad social.

Para investigadores y hacedores de políticas públicas, se recomienda entonces:

- 1) Desarrollar marcos interpretativos que comprendan la ciudadanía como práctica transformadora.
- 2) Promover metodologías participativas de investigación social.
- 3) Diseñar políticas públicas que fortalezcan la resiliencia democrática.
- 4) Fomentar procesos de memoria histórica que aborden críticamente el trauma social.
- 5) Impulsar programas de formación ciudadana que desarrollen capacidades de deliberación y compromiso cívico.

Definitivamente, en la Ucrania de postguerra, la democracia enfrentará desafíos complejos, tales como: la necesidad de reconstruir la cohesión social fragmentada por el conflicto, superar los traumas colectivos y, al mismo tiempo, mantener la energía democratizadora que caracterizó la resistencia del Euromaidán. En los escenarios venideros, las universidades deberán gestionar la tensión entre memoria y futuro, formando ciudadanos capaces de elaborar el dolor histórico sin quedar atrapados en la reproducción de lógicas de confrontación.

Por todas estas razones, la conciencia ciudadana ucraniana emergerá como un proyecto de reconstrucción existencial simultáneamente ontológico y epistemológico, ya que se trata del ser y conocer una nueva realidad nacional donde la educación superior jugará un rol clave en la configuración de subjetividades políticas resilientes, críticas y comprometidas. Con el desafío histórico de mantener viva la potencia democratizadora que ha caracterizado la resistencia ucraniana, transformando el dolor en posibilidad, la fragmentación en comunidad y la destrucción en proyecto de renovación social y política en la era digital.

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Saberes ancestrales agroecológicos en el Chocó-Colombia

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Resumen. Este ensayo, es parte del constructo teórico de la tesis doctoral de la autora. El problema consiste en que, los saberes ancestrales de tradición agroecológica originaria del Chocó-Colombia, han perdido vigencia, reconocimiento y uso, a nivel social. El objetivo es analizar conocimientos e informaciones sobre los saberes ancestrales de los pueblos indígenas y afrocolombianos del Chocó, en referencia a las plantas medicinales. Teóricamente, se estudian textos de autores e investigadores y la documentación con las informaciones de campo, mediante el compartir de la autora con sabedores de la región. Metodológicamente, se trabaja desde el paradigma Constructivista-Sociocultural, el método de investigación documental y se aplica como instrumento una matriz de sistematización teórica de textos y documentos; además, de lo obtenido con la observación participante. Como aporte teórico y cultural hubo hallazgos que permitieron sistematizar y consolidar conocimientos existentes en estos contextos, sobre gran variedad de plantas usadas en salud; y además, teóricamente producto del análisis, se pudo ofrecer una interpretación sobre la diversidad de saberes ancestrales en materia de salud y nutrición; los cuales, hoy ya no se transmiten generacionalmente; y además, se trabajaron teorías y conceptos que aportan al afianzamiento de la identidad étnica, al reconocimiento de su potencialidad agroecológica, a la inclusión de este tema en los planes de estudio, lo cual contribuye a mejorar la calidad de vida de la población. Por ende, se recomienda incluirlos en las políticas públicas de las diversas áreas de interés para la calidad de vida de estas comunidades.

Palabras clave: saberes ancestrales, tradiciones agroecológicas, plantas medicinales, sabedores indígenas y afrocolombianos.

Agroecological ancestral knowledge in Chocó-Colombia

Abstract. This essay is part of the theoretical construct of the author's doctoral thesis. The problem presented is that the ancestral knowledge of agroecological tradition originating from Chocó-Colombia has lost validity, recognition and use, at a social level. The objective is to analyze knowledge and information about the ancestral knowledge of the indigenous and Afro-Colombian peoples of Chocó, in reference to medicinal plants. Theoretically, texts by diverse authors and researchers are studied, as well as documentation with information in the field, through the author's sharing with experts from the region. Methodologically, we work from the Constructivist-Socio-cultural paradigm, the documental research method and a theoretical systematization matrix of texts and documents is applied as an instrument; in addition, from what was obtained with participant observation. As a theoretical and cultural contribution, there were findings that allowed us to systematize and consolidate existing knowledge in these contexts, about a wide variety of plants used in health; and furthermore, as a result of the analysis, an interpretation could be offered about the diversity of ancestral knowledge in matters of health and nutrition; which today are no longer transmitted generationally; and in addition, theories and concepts were applied to contribute to the strengthening of ethnic identity, the recognition of its agro ecological potential, the inclusion of this topic in the study plans, which also contributes to improve the quality of life of the population studied. Therefore, it is recommended to include them in public policies of the various areas of interest for the development of the quality of life of these communities.

Keywords: ancestral knowledge, agroecological traditions, medicinal plants, indigenous and Afro-Colombian knowledge.

INTRODUCCIÓN

La Asamblea General de la Organización de las Naciones Unidas, (2007), aprobó con un total de 192 países, la declaración sobre los derechos de los pueblos indígenas. La Comisión Nacional de los Derechos Humanos, enfocó su interés en la protección, defensa y promoción de los derechos humanos de los pueblos indígenas, por lo cual, obviamente, es obligación de los Estados-Nación, el contribuir a la difusión de las políticas que expone este importante instrumento, lo cual atañe a los derechos indígenas y al uso de la diversidad de la nación pluricultural colombiana; por ende, Colombia firmó esos acuerdos.

Según la Organización de las Naciones Unidas para la Alimentación y la Agricultura-FAO, (2020), los pueblos indígenas originarios son, quienes de facto, históricamente, preservan los saberes ancestrales en materia del uso de la agroecología. En consonancia, con los Objetivos de Desarrollo Sostenible acordados por los Estados miembros de ONU, la FAO tiene como misión apoyar a los gobiernos en el rescate y/o construcción de sistemas agroalimentarios innovadores, inclusivos, eficientes y sostenibles, mediante colaboraciones.

La FAO busca integrar la sostenibilidad de sus proyectos, a partir de tres dimensiones: la social, la económica y la ambiental; sobre todo, en referencia a los sistemas agroalimentarios globales, regionales y locales. Para tal fin, ha de trabajar en estrecha colaboración con gobiernos y actores

clave del sector privado, de la sociedad civil, de organizaciones comunitarias. Ciertamente, y como punto relevante, esta organización establece que, “sólo integrando el desarrollo de los sistemas agroalimentarios y convirtiendo enfoques de diagnóstico holísticos en acciones, políticas e inversiones se podrán abordar los desafíos que enfrentan los sistemas agroalimentarios” (FAO, 2024:s/p).

Del énfasis en la elaboración de normas y programas internacionales, se puede inferir que, se reconoce cómo los saberes y tradiciones ancestrales de las nacionalidades indígenas deben visibilizarse y reivindicar su legitimación, para rescatar las tradiciones y costumbres originarias, las cuales contienen importantes saberes para su autogestión y calidad de vida. Es importante cambiar el ideario popular que ve los pueblos indígenas a la ligera, ubicándoles, como pueblos incultos, desinformados, y/o atrasados.

En Colombia, según el último censo realizado en 2018 (DANE, 2018), el pueblo indígena “Emberá”, se encuentran en la región del Chocó y en algunas zonas de Antioquia y Risaralda, en la región Pacífica. Este pueblo, asume su territorio como sagrado, y tienen una profunda conexión con la naturaleza. Sus tradiciones ancestrales giran en torno al cultivo y uso de las plantas; principalmente, para la alimentación, la salud y la vivienda de sus pobladores. Ciertamente, también esta región está afectada por condiciones económicas precarias, por los embates y secuelas de problemas políticos y de invasión de elementos delictivos e insurgentes, que los han sacado de sus tradiciones endógenas de desarrollo.

Algunos investigadores del tema en Colombia, tales como: Mora (del GRASS) Cruz (de CIBMA) Martínez, (del CERA),¹ y otros, específicamente de la Universidad Tecnológica del Chocó (UTH), del Chocó², coinciden al reconocer la necesidad de utilizar los conocimientos ancestrales de este pueblo indígena, ya que han utilizado sus conocimientos tradicionales para áreas como la agroecología, salud, alimentación, educación, entre otros. Continuar con estos usos y costumbres, contribuiría a retomar las buenas prácticas, dando vigencia al conocimiento indígena; tal como lo proponen los entes internacionales abocados a la materia. Prácticas que, fundamentalmente, se relacionan y vinculan a la tierra, a su lenguaje y a la transmisión intergeneracional de ceremonias, protocolos de salud, gastronomía y formas de vida, preservándoles mediante sus usos, costumbres y tradiciones.

¹Grupo de Investigación en Agroecología y Sistemas Sostenibles (GRASS). Sus investigaciones se centran en la Etnoecología y la agroecología y en la recuperación y revalorización de los saberes ancestrales en el Chocó, con un énfasis particular en los sistemas agroforestales. Solís Luis Fernando y Mora Vanegas Luz Stella, son parte de sus investigadores. En el Centro de Investigaciones en Biodiversidad y Medio Ambiente (CIBMA), se encuentra a Cruz Salazar Clara Inés, quien trabaja en la relación entre las comunidades indígenas, los saberes ancestrales y la agroecología. También, Martínez Hernando García, es investigador asociado al Centro de Estudios Regionales y Ambientales (CERA) en sus investigaciones aborda la etnoecología y la agroecología en comunidades indígenas de Colombia.

²Destacan en el Chocó, Bejarano Mauricio, Investigador de la Universidad Tecnológica del Chocó (UTH) y líder del proyecto ABRIGUE, quien se enfoca en la promoción de la agroecología basada en saberes ancestrales en comunidades indígenas y afro descendientes del Chocó; y también, la autora, de este ensayo, Martínez Borja, N, docente investigadora de la Universidad Tecnológica del Chocó “Diego Luis Córdoba”, quien se mantiene en la línea de saberes ancestrales y plantas medicinales en el Chocó.

Cohientemente, dada la pureza y/o no contaminación de su cosmovisión, de algunos pueblos indígenas del mundo, han logrado mantener un vínculo trascendental con sus tierras, idiomas y culturas, y hoy están reivindicando la importancia de contribuir al resurgimiento del conocimiento indígena, que tiempos atrás, era común que se transmitieran de generación en generación. (Greenwood y Lindsay, 2019). Un ejemplo de que ello, puede seguir perdurando, se ve en países como México, Ecuador, Bolivia, quienes, de acuerdo a sus oficinas de Planificación Nacional, tienen propuestas en el campo de la identidad y cultura; promoviendo, a través de la educación, la etnobotánica, la etnosalud, la producción artística, cultural, memorial y de patrimonios tangibles e intangibles; así como, la inclusión de los conocimientos ancestrales. Todo esto, en una interacción con los diferentes ámbitos del desarrollo del país (Secretaría Nacional de Planificación y Desarrollo-México, 2017).

Hasta el día de hoy, se reconoce al Chocó como una de las regiones más biodiversas del mundo; específicamente, en lo que a plantas comestibles y medicinales se refiere. Sin embargo, se desconoce una mayor descripción de la problemática referida a los usos y costumbres sobre plantas de la región. Hay carencia de estudios sobre la pertinencia del conocimiento y uso de la agroecología, botánica y salud en la región, tampoco se conocen o identifican algunos “sabedores”³ de la región chocona, para apoyarse en sus saberes.

Consecuentemente, el objetivo del ensayo, es explicar el análisis, sistematización y consolidación de conocimientos e informaciones sobre los saberes ancestrales de los pueblos indígenas y afrocolombianos del Chocó, en referencia a las plantas medicinales. Esto se realiza, a partir de la documentación de destacados investigadores en el tema de los usos y costumbres que le asignan estos pueblos indígenas y afrocolombianos, a las plantas para sanar cuerpo, mente y espíritu. Por ende, esta investigación documental aborda, primeramente, los fundamentos teórico-epistemológicos del tema; segundo las principales tradiciones agroecológicas; como tercer punto, los principales tópicos sobre plantas medicinales en la región, según los sabedores de los pueblos indígenas y afrocolombianos del Chocó-Colombia (Plantas usadas para sanar las enfermedades del cuerpo, para problemas de la mente y de nivel espiritual).

Teóricamente, se estudian textos de destacados autores e investigadores en el tema; y, la documentación con las informaciones obtenidas en campo, mediante el compartir de la autora con sabedores de la región. Se desarrolla lo referido a los fundamentos teórico-epistemológicos, las principales tradiciones agroecológicas y los **tópicos** sobre plantas medicinales. A partir de los hallazgos, como aporte teórico y cultural se logra sistematizar y consolidar conocimientos existentes en estos contextos, sobre gran variedad de plantas usadas en salud; y además, producto del análisis, se pudo ofrecer una interpretación sobre la diversidad de saberes ancestrales en materia de salud y nutrición; los cuales, hoy ya no se transmiten generacionalmente.

Además, se trabajaron teorías y conceptos que aportan al afianzamiento de la identidad étnica, al reconocimiento de su potencialidad agroecológica, a la inclusión de este tema en los planes de estudio, lo cual contribuye a mejorar la calidad de vida de la población. Por ende, se recomienda incluirlos en las políticas públicas de las diversas áreas de interés para la calidad de vida de estas comunidades.

y, finalmente, se cierra aportando unas Reflexiones Finales.

³Definición usada en referencia a aquellas personas de la comunidad que poseen conocimientos profundos y experiencias notables en la materia; es aquella persona conocedora, entendida, enterada; en este caso, en alusión al uso de plantas, sobre todo las de uso medicinal.

DESARROLLO

Fundamentos teórico-epistemológicos

Para discernir respecto a fundamentos teórico-epistemológicos que explican el conocimiento ancestral de las comunidades indígenas y afrocolombianas, implica iniciar reconociendo varias categorías de análisis tales como: patrimonio cultural, cosmovisión y sistemas de conocimiento y saberes ancestrales. Así entonces, se resume que se entiende por “Identidad Cultural”, la postura que reconoce y da relevancia a las identidades culturales únicas y diversas de comunidades indígenas y afrocolombianas, cuya riqueza cultural está construida no sólo sobre la base de su sabiduría y creatividad; sino, además, desde sus historias y sus luchas por la autodeterminación como pueblo. Es imprescindible, reconocer que, estas comunidades tienen una riqueza de “conocimientos tradicionales”, prácticas y creencias ancestrales, centradas en su relación con la naturaleza y el medio ambiente social y natural, proceso denominado “saberes ancestrales”.

Es justicia epistémica entender que, estas comunidades tienen sus propias formas de conocer y producir conocimiento, diferentes al conocimiento científico occidental. Conocimiento que han construido históricamente, con el cual han batallado por mantener dado el avasallamiento de la cultura occidental hacia sus territorios. Como se sabe, los análisis sobre sus experiencias de vida, su historia y sus saberes, generalmente, adoptan una perspectiva colonial que desafía la narrativa propia de las comunidades indígenas y afrocolombianas, prevaleciendo la visión occidental dominante en políticas públicas que les son suministradas; su educación, salud y demás servicios; subyugándose las voces y necesidades de estas comunidades, según sus usos y costumbres. Ciertamente, estas comunidades enfrentan vacíos jurídicos y políticos en cuanto a su etnicidad y variadas formas de opresión, que se muestran dada su desdibujada expresión cultural y tradiciones.

Estas temáticas y problemáticas subyacentes han sido estudiadas por diversos autores y desde una perspectiva académica e inclusiva de los saberes originarios de estos pueblos, muy específicamente, ha sido de gran relevancia estudiar “La Epistemología del Sur”, de Boaventura de Sousa Santos (2009), pues su enfoque invita a la reflexión, explora sistemas de conocimiento alternativos de las comunidades indígenas de América Latina, desmontando la mirada colonizadora y muestra espacios de acción democráticos en aquellos lugares que la modernidad ha considerado irrelevantes. En resumen, desafía la epistemología tradicional, y propone un enfoque inclusivo y diverso del conocimiento.

Esta postura epistémica es la que se enfoca en este ensayo, con una mirada de reconocimiento a la historia, perspectivas del conocimiento, prácticas de los pueblos originarios; lo cual es valioso para aquellos investigadores o interventores sociales, interesados en comprender la importancia de incorporar diversas perspectivas en su búsqueda de conocimiento científico. En concordancia con esto, se cree que, promover y participar en investigaciones sobre pueblos originarios, que sean inclusivas de sus opiniones e intereses, respetuosas de su autonomía y autodeterminación y, que promueva intervenciones sociales en estas comunidades, viene a hacer la diferencia y marcará un realce de sus saberes y prácticas de gran utilidad para su calidad de vida.

Principales tradiciones agroecológicas en el Chocó-Colombia

Las tradiciones de los saberes ancestrales en el Chocó-Colombia, encuentran en las acciones de la vida resiliente de ese pueblo, en el aprovechamiento de la biodiversidad, en el esfuerzo por mante-

ner la tradición, la identidad, la soberanía alimentaria y la economía local, en la fuerza y autenticidad cultural, demostrada por los pueblos indígenas y afro colombianos de la región; aun cuando, les azotan adversidades en las condiciones sociales, económicas, políticas y ambientales; factores a los que, el país y el mundo le apuestan a su superación y desarrollo, para garantizar los recursos naturales del futuro y la calidad de vida de los pueblos en estado vulnerable hoy, en el Chocó, y en toda Colombia. Por ende, las principales tradiciones ancestrales de tipo agroecológico en el Chocó-Colombia, por parte de las comunidades indígenas y afro descendientes, han desarrollado a lo largo de siglos, un rico patrimonio basado en una profunda comprensión del ecosistema y una estrecha relación con la naturaleza. Estas tradiciones, se caracterizan por realizar un manejo sostenible de la biodiversidad, según se lee en el Plan Departamental de Extensión agropecuario- Chocó 2020 – 2023, que dirige el Estado-Gobierno, a partir de los siguientes factores: (Gobernación, 2020).

- Sistemas agroforestales que usan la combinación de cultivos agrícolas, árboles frutales y maderables, y otras especies vegetales en un mismo terreno; lo cual ha permitido diversificar la producción, conservar la fertilidad del suelo y proteger la biodiversidad.
- **Policultivos, consistentes en la siembra** de diferentes cultivos en el mismo terreno, aprovechando las sinergias entre las plantas para mejorar la salud y nutrición del suelo.
- Uso de técnicas ancestrales para la conservación y almacenamiento de una gran variedad de semillas nativas de maíz, frijol, yuca, plátano, chontaduro y otras especies adaptadas a las condiciones locales; y adicionalmente, usan entre grupos comunitarios agricultores, el intercambio de estas, para fortalecer la diversidad genética y la resiliencia de los cultivos.
- **Control natural de plagas y enfermedades y uso** de plantas repelentes y trampas naturales, usando estrategias biodiversas en los agro ecosistemas para atraer enemigos naturales de las plagas; así como la aplicación de preparados botánicos a base de plantas medicinales.
- **Prácticas de abono orgánico o** utilización de compostaje, lombricultura y otros métodos para la elaboración de abonos orgánicos a partir de desechos agrícolas y ganaderos para mejorar la fertilidad del suelo y la nutrición de las plantas.
- Rotación o cambio periódico de los cultivos en un mismo terreno para evitar el agotamiento del suelo y la proliferación de plagas y enfermedades.
- **Respeto por los ciclos naturales por parte de** las comunidades; de tal manera que, ajustan sus actividades agrícolas a los ciclos lunares, las estaciones del año y otros fenómenos naturales. Es de destacar que se realizan prácticas rituales y espirituales para agradecer a la naturaleza por sus frutos y pedir protección para los cultivos.
- Adaptación a los efectos del cambio climático, dado que las comunidades han desarrollado estrategias ancestrales como la diversificación de cultivos y la selección de variedades más resistentes a la sequía o las inundaciones.

De facto, se invita a mantener, las casi extintas tradiciones agroecológicas, en pro del acceso a alimentos sanos y nutritivos para las comunidades, fortaleciendo su seguridad alimentaria y soberanía alimentaria; dada la importancia de las tradiciones ancestrales agroecológicas del Chocó, vistas como un patrimonio cultural invaluable, que contribuye a la conservación de la biodiversidad, la seguridad alimentaria y el desarrollo sostenible.

Principales tópicos sobre plantas medicinales en la región del Chocó-Colombia según los sabedores de los pueblos indígenas y afrocolombianos

Siguiendo la investigación de Valoyes y Palacios (2020), se tomará aquí la compilación que hicieron estos investigadores botánicos, al registrar datos de la literatura pertinente, donde lograron sistematizar todos los usos medicinales de diversas plantas en el Chocó, coincidiendo con los usos que le dan los sabedores de esa región. Por ende, se ofrece aquí un resumen de su clasificación y aporte respecto a las categorías referidas a enfermedades.

Sobre el departamento del Chocó, se obtuvo información tomando en cuenta los usos y costumbres de los grupos indígenas, quienes afirmaron que pueden usarse todas las partes de las plantas: sus frutos, sus hojas, flores, tallo, raíces y aceites; razón por la cual, le han dado un uso médico y efectivamente, en la experiencia de estos pueblos, se pueden curar diversas enfermedades. A continuación, en base a los “usos” que le dan los pueblos indígenas y afro-colombianos de las plantas medicinales propias del Chocó, se enlista una compilación tomada de Escalante y Martínez (2020); Valoyes y Palacios (2020), E. Ledezma (2011), Gamboa y Mosquera (2014). Se intenta hacer un aporte acerca de los usos y costumbres sobre las plantas medicinales más reconocidas en el Chocó. Se insiste que, esta clasificación se fundamenta en estudios científicos y en lo anunciado por sabedores de la región, los cuales sistematizan las plantas usadas para enfermedades del cuerpo, de la mente y del espíritu, así:

Plantas usadas para sanar las enfermedades del cuerpo:

Nombre Científico: Altamisa- **Nombre Popular:** Altamisa: La usan para sacar la frialdad en la matriz de la mujer.

Nombre Científico: Alternanthera - **Nombre Popular:** Discansel o Lanceolata grande: lo usan como anti-inflamatorio. Los extractos del tallo se usan para combatir la Malaria y tomado lo usan para casos de insolación.

Nombre Científico: Astragalus - **Nombre Popular:** Astragalus: usan la raíz para mejorar los glóbulos blancos, aumentando anticuerpos. La usan como activadora del sistema inmunitario, para combatir infecciones virales, contra tumores y para infecciones respiratorias, en caso de resfriados y las gripes.

Nombre Científico: Asteraceae - **Nombre Popular:** Asteraceae. Le usan para curar abscesos con pus, para la gonorrea, herpes, para el sarampión, erisipela, para neumonías y para enfermedades infectocontagiosas.

Nombre Científico: Aloe vera - **Nombre Popular:** sábila: para regular la glucosa, bajar el colesterol; para infecciones digestivas; para el estreñimiento; para recuperar la flora intestinal. Para daños por sol, para blanquear la piel, para aliviar quemaduras por fuego.

Nombre Científico: Crocus sativus - **Nombre Popular:** Azafrán: para prevenir el cáncer; para prevenir enfermedades cardiovasculares, y como anti-inflamatorio y antioxidante. Para aliviar trastorno premenstrual, la irritabilidad, ansiedad, dolor de cabeza, cólico y deseo de alimentos dulces; para prevenir problemas cardiovasculares; para la salud sexual. También, para perder peso y reducir el índice de masa corporal.

Nombre Científico: Bactris gasipaes - **Nombre Popular:** hontaduro (Tallos tiernos: palmitos). Lo usan para reducir los niveles de colesterol malo, y mejorar la salud del corazón. Para controlar la

diabetes; para mejora la visión; para prevenir el cáncer; para relentizar el envejecimiento; para prevenir y aliviar el cáncer de colon; para problemas cerebrovasculares y cardiovasculares.

Nombre Científico: Borago officinalis - **Nombre Popular:** Borraja: para la fiebre.

Nombre Científico: Botoncillo - **Nombre Popular:** Botoncillo: para curar el hígado.

Nombre Científico: Cananguchales - **Nombre Popular:** Moriche: Usan la semilla (su endospermo líquido), y para los riñones.

Nombre Científico: Citrus limón - **Nombre Popular:** Limón: Lo usan para dolores de estomacales, parásitos, diarrea, para la gastritis, para infecciones, espiratorias, resfriados y gripe, para cálculos renales, para dolores de cabeza, para inflamaciones, para el insomnio, para la diabetes, para la hipertensión, para dolor muscular, contra el cáncer.

Nombre Científico: Celedonia - **Nombre Popular:** Celedonia: El sumo, mezclado con aceite de Higuera, se emplea para expulsar gusanos, lombrices y otros parásitos intestinales, para rebajar la hinchazón. Se usa para problemas con la bilis.

Nombre Científico: Chelidonium majus - **Nombre Popular:** Celedonia: Lo usan para intoxicaciones por ingesta de algunos alimentos, para problemas digestivos.

Nombre Científico: Churco - **Nombre Popular:** Churco: Lo usan para erupción en la lengua y paladar de niños de pocos meses de nacidos.

Nombre Científico: Curcuma longa- **Nombre Popular:** Azafrán, Azufre de Indias, Azafrán de raíz: Lo usan como antioxidante, como antiinflamatorio, como hepatoprotector, como digestivo, como depurativo, como antiviral, como antibacterial, para mejorar la artritis, para los dolores musculares, para la hepatitis, para los cálculos biliares, para la diabetes, para los problemas de circulación, para problemas digestivos.

Nombre Científico: Cocos nutifera - **Nombre Popular:** Coco: El aceite de esta planta lo usan como antibacterial, para la resistencia de los antibióticos, omeopáticos y a las bacterias. El agua de coco para la nutrición, principalmente de bebés y ancianos.

Nombre Científico: Cymbopogon citratus - **Nombre Popular:** Hierba Luisa, Zacate Limón: Lo usan para problemas digestivos o gastrointestinales, como indigestión, cólicos y gases. También, como antiespasmódico, para control del colesterol, para disminuir el riesgo de enfermedades cardiovasculares, como antimicrobiano y repelente de insectos, para la pérdida de peso, para control del metabolismo, para el alivio de dolores y malestares, como antiinflamatorio, dolores de cabeza, para aliviar dolores musculares.

Nombre Científico: Costus spicatus - **Nombre Popular:** Caña agria: La usan como tónico y astringente, como antirreumático, antiinflamatorio de vejiga y riñones, como antidiabético, como diurético, como depurativo.

Nombre Científico: Dalea coerulea - **Nombre Popular:** Dalea: para combatir la tos.

Nombre Científico: Drymonia serrulata - **Nombre Popular:** Desbaratadora: Las hojas en infusión la usan contra quistes y fibromas. También, como analgésico y antiinflamatorio.

Nombre Científico: Eonium tabuliforme - **Nombre Popular:** Pastel de risco, yerba puntera, Góngano: El jugo de las hojas machacadas a modo de ungüento se usa para calmar el dolor, en heridas superficiales, en picaduras y en quemaduras ligeras.

Nombre Científico: *Eperomia pellucida* - **Nombre Popular:** Corazón de hombre, Hierba de plata, Berro de monte, Berro falso: Al licuarse con zanahoria, lo usan como energético. En té lo toman para aliviar la artritis y en unguento, para frenar el acné. También lo usan para combatir los resfriados, para la conjuntivitis, para la fiebre, para la tos y para convulsiones. Así como, para problemas renales, para la retención urinaria, el estreñimiento, para bajar al exceso de colesterol.

Nombre Científico: *Eucalyptus globulus* - **Nombre Popular:** Eucalipto: Lo usan como expectorante y descongestionante bronquial, como antiinflamatorio, como antiséptico, como cicatrizante, como hipoglucemiante, como inmunoestimulante, como antirreumático, como analgésico, como antihistamínico, como antiviral, como antitumoral, como astringente, como antioxidante, como hepato protector, para heridas, como cicatrizante.

Nombre Científico: *Erythroxylum coca* - **Nombre Popular:** Coca jipie: La usan como analgésico, como antioxidante, contra varios tipos de bacterias, para regular la glucosa, para soportar frío y el hambre, como calmante contra dolores de cabeza, para trastornos digestivos como el dolor de estómago, espasmos intestinales, náuseas, indigestión, diarrea.

Nombre Científico: Fabaceae - **Nombre Popular:** Faba: La usan para dolores de cabeza, para dolor del cuero, para abscesos con pus, para la gonorrea, herpes, para el sarampión, para la erisipela, para la neumonía, para enfermedades infectocontagiosas.

Nombre Científico: Hierbabuena - **Nombre Popular:** Hierbabuena. Lo usa como aromático, antioxidante, antiinflamatorio, antiespasmódico, digestivo, analgésico, También, para controlar y eliminar el mal aliento, como antibacterial, para ayudar a las mujeres con alteraciones hormonales, o con síndrome de ovario poliquístico, hirsutismo, para elevar los niveles de las hormonas femeninas y disminuir los niveles de andrógenos. Su aceite, lo usan como antiinflamatorio y analgésico, para dolores de cabeza, musculares o articulares, y en el tratamiento de osteoartritis, para aliviar cólicos digestivos, mala digestión, diarreas y gases, para el intestino irritable, sus dolores e hinchazón. Además, para disminuir las náuseas, los vómitos, para la acidez, y para la producción de bilis.

Nombre Científico: *Ficus uschnathiana* - **Nombre Popular:** Higuerón: lo usan como purgante. Los frutos los usan como sedativos.

Nombre Científico: *Gliricidia sepium* - **Nombre Popular:** Mata ratón: Lo usan para el paludismo, para el dengue, para la gripa, para el Covid-19.

Nombre Científico: *Hamelia sanguinea* - **Nombre Popular:** Hamelia: la usan para contrarrestar el azúcar en la sangre. El extracto para disminución de triglicéridos.

Nombre Científico: *Hedyosmum racemosum* - **Nombre Popular:** Romero: Lo usan para el dolor de ciática, el dolor musculoesquelético y para dolores musculares y de la regla.

Nombre Científico: Higuerón - **Nombre Popular:** Higuerón: El fruto del árbol "cedro", se emplea en tratamientos del hígado, alteraciones de la vesícula biliar, y la hipertensión.

Nombre Científico: *Kalanchoe pinnata* - **Nombre Popular:** Hoja santa, hoja del aire o planta de vida: Lo usan para fortalecer el sistema inmunitario, para aliviar la sinusitis, para aliviar la artritis, para problemas de la piel, para reducir la diabetes, para infecciones, para problemas de la piel, quemaduras, heridas y úlceras; para reducir el dolor y la inflamación de articulaciones, la artritis, como analgésico, como antiinflamatorio, como descongestionante, como antibacterial, como antioxidante. Para infecciones, para dolores de cabeza, para enfermedades del hígado, como cicatrizantes y regenerado de la

piel, para tratar la psoriasis, para aliviar quemaduras. También, como protector del páncreas, para la inflamación de las vías respiratorias, para problemas respiratorios como el asma y la tos.

Nombre Científico: Limoncillo - **Nombre Popular:** Limoncillo: Lo usan como antiséptico, como digestivo, como carminativo, como broncolítico, como diaforético.

Nombre Científico: Malva sylvestris - **Nombre Popular:** Malva: Lo usan para la tos con catarro, bronquitis, para la candidiasis oral, para estomatitis, aftas, para la faringitis, para la laringitis, para el dolor de garganta, para el estreñimiento, para la colitis, para la gastritis, para úlceras en el estómago, contra los furúnculos, para la picadura de insectos, para la dermatitis o quemaduras, para infecciones en la boca, para la piel.

Nombre Científico: Manicaria saccifera - **Nombre Popular:** Napa, Cabecinegro, Taparo, Sanaagua, Palmiche: Lo usan para afecciones renales. Su fruto como diurético. Las semillas inmaduras las usan para calmar la sed en las faenas.

Nombre Científico: Llantén - **Nombre Popular:** Llantén: Lo usan para afecciones de los riñones, para la hipertensión arterial, para el cáncer.

Nombre Científico: Matricaria recutita - **Nombre Popular:** Manzanilla, Chamomile: Lo usan como antiinflamatorio.

Nombre Científico: Mentha piperita - **Nombre Popular:** Menta: Lo usan como digestivo, como analgésico.

Nombre Científico: Minthostachys mollis - **Nombre Popular:** Poleo o tipo blanco: Lo usan para la gripe, para la tos.

Nombre Científico: Mollinedia ovata - **Nombre Popular:** Wawallpa panka pequeña: Lo usan para bajar la fiebre.

Nombre Científico: Origanum vulgare - **Nombre Popular:** Orégano: Lo usan como antibacterial, como antifúngida.

Nombre Científico: Paico - **Nombre Popular:** Paico: Lo usan para los parásitos.

Nombre Científico: Piper auritum - **Nombre Popular:** Tlanepa, Alaján, Momo, Pimienta Sagrada: Utilizada en emplastos para dolores musculares o quemaduras; para la inflamación, para la infección de la matriz, para después del parto, como galactógeno, para acelerar el parto, para aliviar dolor de estómago o espasmo, para superar la falta de apetito, para el estreñimiento. También, para el asma, la laringitis, para el reumatismo, para curar llagas, para los riñones, para la vista, para purificar la sangre, para mordeduras de víbora, para inflamaciones, para dolores musculares, para cólicos, para dar baños a los recién nacidos, para el pujo, contra las lombrices intestinales, para el susto y para quemaduras.

Nombre Científico: Pimpinella anisum - **Nombre Popular:** Anís: Lo usan para combatir la indigestión, gases, náuseas, estreñimiento y los cólicos intestinales y menstruales, como laxante, anti inflamatorias, para aliviar el dolor de cabeza y ayudar en el tratamiento de las crisis de migraña, como analgésico, como antioxidante, como antiviral, como antibacterial, para fortalecen el sistema inmunitario, para combatir bacterias, hongos y virus, para aliviar tos, gripe, inflamación de garganta, como antialérgico; también, para controlar las convulsiones, como estrogénico, y para aliviar los síntomas de la menopausia, para mejorar la circulación de la sangre y evitar la formación de coágulos, para prevenir derrame cerebral, trombosis e infarto de miocardio.

Nombre Científico: *Peperomia pellucida* - **Nombre Popular:** Celedonia: Como diurético.

Nombre Científico: *Piper peltatum* - **Nombre Popular:** Cordoncillo, Hierba Santa, Acuyo. Lo usan para bajar la inflamación de la matriz después del parto. Para mejorar la producción de leche materna, para aliviar el dolor del período menstrual. Útil en cataplasma, para aliviar el dolor de cabeza, para aliviar el dolor de las articulaciones, reumatismo y contusiones. Para bajar la fiebre se toma un baño de agua tibia, con las hojas, como analgésico, como estimulante y para calmar la tos.

Nombre Científico: *Piper tricuspe* - **Nombre Popular:** Kana: Lo usan para las infecciones, para el paludismo, para mordedura de serpientes.

Nombre Científico: Piperaceae - **Nombre Popular:** Piper: Lo usan para la mordedura de serpientes, para contrarresta el veneno por mordedura de serpiente.

Nombre Científico: *Piper darienense* - **Nombre Popular:** Hoja santa: Lo usan como antiinflamatorio en área vaginal, estomacal o de riñones. También, para disminuir la fiebre, para dolores de estómago y problemas relacionados con estreñimientos o diarrea, como antiespasmódico para reducir los dolores en las articulaciones, para el estreñimiento, para problemas respiratorios como el asma y la bronquitis, la tos y la congestión respiratoria, de manera tópica para heridas y su cicatrización, para combatir dolores varios y estomacales.

Nombre Científico: Piperaceae - **Nombre Popular:** Cordoncillo o deshinchadora: Lo usan para “deshinchar”, como antibiótico, para combatir la malaria.

Nombre Científico: *Pringamosa* - **Nombre Popular:** Ortiga: Lo usan para aumentar los glóbulos rojos.

Nombre Científico: *Raubolfia leptophylla* - **Nombre Popular:** Palo santo, Palo boniato, Palo moniato. Los tallos o frutos machacados los usan para la mordedura de serpientes, la picadura de avispas y escorpiones, para tratar malaria, para dolor de estómago, para bajar la tensión arterial, como depurador, y febrífugo. Las infusiones de hojas las usan para la disentería y malaria. La savia o látex le usan en hidropesía y para la tos crónica, para ojos inflamados, para desintegrar muelas.

Nombre Científico: *Salvia officinalis* - **Nombre Popular:** Salvia: la usan como antiséptico, anti fúngico, antiviral, astringente, estrogénico, antiespasmódico, hipotensor, antiinflamatorio, antioxidante, hipotensor, hipoglucemiante, emenagoga, carminativa, febrífuga, tónico, aromatizante. Además, para aliviar los trastornos digestivos, gastroenteritis, náuseas y diarreas, hinchazón abdominal y gases. También, para recobrar el apetito, para reducir la glucosa en la sangre, para disminuir sudores nocturnos, sofocos y exceso de salivación, como apoyo en la menopausia, como estimulante uterino, que favorece el flujo menstrual, para resolver desórdenes hormonales, para estimular la secreción de bilis. Para las llagas, heridas en lengua, boca o encías sangrantes o inflamadas, para reducir el dolor de muelas, para blanquear los dientes. Y, además, la usan para las picaduras de insectos, para aliviar la irritación ocular, para la caída del cabello.

Nombre Científico: *Ricinus communis* - **Nombre Popular:** Igerilla: para la digestion.

Nombre Científico: *Ruta graveolens* - **Nombre Popular:** Ruda: La usan para la menstruación. (no se recomienda su consumo en el embarazo, por su efecto abortivo), para regular la menstruación, favoreciendo su aparición. También, para el sistema digestivo, como antiespasmódico, para los dolores espasmódicos del intestino, como calmante de la tos, para problemas del sistema respiratorio, para bajar la presión sanguínea.

Nombre Científico: Saúco - **Nombre Popular:** Sauco: Lo usan contra las fiebres y calofríos palúdicos. Con limón para la gripa, para la bilis, contra el paludismo.

Nombre Científico: Santa María Boba - **Nombre Popular:** Santa María: La usan para el reflujo, descomposturas del cuerpo.

Nombre científico: Scoparia dulcis - **Nombre Popular:** Scoparia: Lo utilizan para la diabetes, para la hipertensión, para cálculos renales, para las hemorroides.

Nombre Científico: Trichanthera gigantea - **Nombre Popular:** Nacedera, Árbol de la mujer: Es utilizado en formas diversas antes y después del parto. También las parteras la usan en niños recién nacidos para limpiar restos de placenta. Además, para tratar trastornos respiratorios, para trastornos digestivos, para afecciones del hígado, para problemas de riñones, en lesiones de la piel, como antihipertensivo, para desbaratar coágulos de sangre, como antipirético, para hernias, para perder peso corporal, para recupera el sistema endocrino, para problemas del sistema muscular.

Nombre Científico: Siparuna sessiliflora - **Nombre Popular:** Siparuna: lo usan como antiinflamatorio. Usan las hojas como analgésicas y cicatrizantes. Usan la infusión de las hojas y frutos contra la cefalea, fiebre, para el paludismo, como antimicrobiano, anti fúngica.

Nombre Científico: Siparuna guianensis - **Nombre Popular:** Siparuna: Lo utilizan para afecciones dolorosas, para edema intraarticular, contra la peritonitis, en el edema del oído.

Nombre Científico: Solanaceae - **Nombre Popular:** Sola: Lo usan, para curar abscesos con pus, para gonorrea, para herpes, para sarampión, para la erisipela, para las neumonías, para enfermedades infectocontagiosas y para combatir dolores de cabeza.

Nombre Científico: Uncaria guianensis - **Nombre Popular:** Uña de gato: Lo usan para la rinitis, para el asma, para amigdalitis, para alteraciones en la piel, para la gonorrea, para disminuir la presión arterial, para mejorar el intestino irritable, para la enfermedad de Crohn, para las úlceras, para problemas de gastritis, como anticancerígeno, como antioxidantes, para aliviar los síntomas de la osteoartritis, para aumentar las defensas, para la producción de glóbulos blancos y la activación de las células del sistema inmune, como diurético, como antioxidantes, como antiinflamatorio, para tratamiento de infecciones.

Nombre Científico: Urera baccifera - **Nombre Popular:** La ortiga brava: para tratar artritis, para reumatismos, para controlar el ácido úrico, para aliviar golpes, para inflamaciones, para fiebres, para dolores de muela, para quemaduras, para furúnculos, abscesos, para alergias, contra la diabetes, para eliminar cálculos renales, como depurativo, emoliente, diurético, antianémico, hemostático, antiinflamatorio, analgésico y astringente.

Plantas medicinales reconocidas con usos para problemas de la mente:

Nombre Científico: Verbena litoralis - **Nombre Popular:** Verbena. Se usa para combatir el insomnio, es excelente somnífero.

Nombre Científico: Uncaria guianensis - **Nombre Popular:** Uña de gato: para alzhéimer.

Nombre Científico: Siparuna sessiliflora - **Nombre Popular:** Siparuna: para afecciones psicomáticas.

Nombre Científico: Matricaria recutita - **Nombre Popular:** Manzanilla, Chamomile: Lo usan como sedante.

Nombre Científico: Lamiaceae - **Nombre Popular:** Lamia: para dolores de cabeza.

Nombre Científico: Hierbabuena - **Nombre Popular:** Hierbabuena. Lo usa como ansiolítico, como calmante, como relajante y sedante que ayuda a aliviar el estrés mental, la ansiedad y a mejorar la calidad del sueño. También, para aumentar la memoria y la capacidad mental, además de mejorar el estado de ánimo.

Nombre Científico: Hedyosmum racemosum - **Nombre Popular:** Romero: Lo usan para mejorar el estado de ánimo en adultos sanos, para los trastornos emocionales, como la ansiedad, para el tratamiento del dolor, como analgésico, para el dolor neuropático o lesiones del sistema nervioso central o periférico. Lo utilizan contra las dependencias, por lo que reduce los síntomas del síndrome de abstinencia, para disminuir la aparición de las convulsiones o epilepsia, para estimular habilidades intelectuales, para prevenir y combatir síntomas como la pérdida de memoria, las dificultades en el aprendizaje e, incluso, el Alzheimer, como analgésico suave para tratar los dolores de cabeza, el insomnio y el malestar emocional, para el estrés y como fortalecedora.

Nombre Científico: Alternanthera - **Nombre Popular:** Discansel o Lanceolata grande: lo usan como relajante, para los nervios, preocupación, para dolor de cabeza.

Nombre Científico: Crocus sativus - **Nombre Popular:** Azafrán: Se usa para prevenir enfermedad de Parkinson, para el Alzheimer, como antidepresivo, para la irritabilidad, la ansiedad y para el dolor de cabeza.

Nombre Científico: Citrus limón - **Nombre Popular:** Limón: Lo usan para la depresión, para la ansiedad.

Nombre Científico: Cymbopogon citratus - **Nombre Popular:** Hierba Luisa, Zacate Limón: Lo usan para la reducción del estrés y la ansiedad.

Nombre Científico: Mimosa púdica - **Nombre Popular:** Dormidera o Dormilona, Sensitiva, Mimosa sensitiva, Vergonzosa, Planta de la vergüenza: Del fruto blanco se extrae el opio y se usa para combatir el insomnio, en bebedizos o en baños de cabeza y cuerpo entero. Es alucinógena.

Nombre Científico: Eperomia pellucida - **Nombre Popular:** Corazón de hombre, Hierba, Berro de monte, Berro falso: para los trastornos mentales y la debilidad de espíritu.

Plantas medicinales reconocidas con usos para problemas espirituales:

Durante todo el desarrollo de humanidad, y, por ende, en el ámbito científico, ha existido una asociación entre espiritualidad (no religión) y salud. Pues, de hecho, la medicina y la espiritualidad son áreas que tienen en común la cuestión de las potencialidades humanas como ser integral, integrado con cuerpo, mente y espíritu.

Muchas civilizaciones antiguas desarrollaron su servicio de salud en la figura de un sacerdote médico, como el poder curativo divino en las figuras de los chamanes de las tribus indígenas, los druidas de las antiguas civilizaciones europeas, y los curanderos y hechiceros de las tribus africanas y Oceanía (Gerone, L. 2020:1).

...la asociación entre cuerpo y espíritu es parte de discursos sobre la atención de la salud humanizada, porque el uso indiscriminado de la tecnología,..., puede resultar en el abandono, a menudo no intencional, de otras dimensiones humanas respetables, como la comodidad y el control del dolor, la comunicación, valores significativos y, especialmente, cuestiones espirituales (Peres, 2007:86).

En la Edad Moderna, debido a los avances científicos se inició la separación entre cuestiones espirituales y de salud. Hoy día, ya avanzado el siglo XXI, la influencia de la espiritualidad en el estado de la enfermedad, volvió a despertar interés entre los médicos e investigadores. Ciertamente, hoy se aprecia mayor apertura y una visión más interdisciplinaria en la medicina contemporánea, que no sólo se enfoca en la atención de la salud física; sino que también atiende cuestiones emocionales, o de influencia espiritual para el paciente; tales como: el cuidado en relación con los demás, con uno mismo y con trascendencia (Moreira-Almeida, 2010).

En Colombia, en la región del Chocó, culturalmente, ya se ha dicho que las enfermedades y su medicina se asocia a temas de origen espiritual, como el susto, la depresión, el cambio de humor, el llanto, entre otros (Villanueva, 2020). La medicina tradicional que practican nativos indígenas, mestizos y afrocolombianos de esta región, se hace con plantas tomadas de la biodiversidad del territorio; práctica que ha desempeñado un rol importante siempre adaptada o con variantes propias de la cultura tradicional según su pertenencia étnica.

Así entonces debe considerarse que, en muchas tradiciones religiosas o cultos espirituales de pueblos originarios y negroides, las plantas son vistas, espiritualmente, como simbólicas, revitalizadoras, curativas y en ocasiones, sagradas; en el entendido que pueden actuar como intermediarias con el mundo divino. Compilando informaciones de varias fuentes: la entrevista a Múniera Gómez, investigador de saberes ancestrales, en el programa “El Atardecer”, en el tema “cultura medicina-ancestral”; y otro, referido a Plantas medicinales de Colombia; además, del periódico “El Tiempo” en su sección de salud, se sistematiza información sobre algunas plantas medicinales colombianas.

Se afirma que, la ingesta de plantas exóticas y las llamadas “limpias”, son sólo algunas de las prácticas que nacieron en los pueblos indígenas de América (y otros continentes), para encontrar alivio no solo a males físicos, que los médicos consideraban incurables; sino también, como alivio a perturbaciones que consideran “espirituales”; o como malestares emocionales, conocidos, popularmente, como corazón roto, odio, envidias, rencor, tristeza y hasta falta de motivación; los cuales, para los ancestros de toda Latinoamérica, son señales de una alma dañada o energías perturbadas. En este apartado, se señalan algunas hierbas y plantas usadas en la práctica ancestral con pretensión de alineación espiritual, según la tradición de nativos del Chocó:

Albahaca: Sus virtudes están referidas con las predicciones en el amor. Es una hoja considerada sagrada. Los católicos, la asocian con la adoración de la cruz, particularmente durante la cuaresma, y la usa para purificar el agua y una rama de sus hojas para rociar el agua en la congregación. Mucha gente planta la albahaca en su casa como una bendición.

El peyote: Es un cactus pequeño, usado en ceremonias religiosas y puede provocar alucinaciones, que las sabedoras/es piensan son visiones del mundo espiritual.

Hierba de San Juan: Creen que sirve para la depresión. Le usa para atraer el amor rápidamente. Le queman para espantar demonios, hadas malas, duendes y malas intenciones.

Lavanda: Es considerada por las sabedoras/es como un poderoso agente que limpia el hogar de energías negativas, además de colaborar en la meditación y la proyección astral.

Marihuana: (Cannabis): Tiene una importancia religiosa, pues creen que es el “Árbol de la Vida” o “planta sagrada” al que se refiere la biblia; por lo cual, algunos le dan un uso sagrado. El uso religioso de la planta incorpora, lo que llaman “sesiones de razonamiento”, que son reuniones

comunales donde se discute sobre la vida y creen que al fumarla les ofrece más conocimiento y sabiduría. También, ven el uso de la hierba como un acercamiento a Dios, el universo y su ser interno espiritual.

Muérdago: Actualmente, se asocia con rituales. Creen que tiene propiedades milagrosas. Una poción podía servir como antídoto contra venenos, asegurar la fertilidad en humanos y proteger contra maleficios. (El muérdago es tóxico al ingerirlo).

Oreja de agua: (*Buchosia aquatica*), la usan para el mal de ojo, para el arrebató y para amansar niños bravos.

Romero: Es una de las plantas favoritas del saber mágico popular. La utilizan como aromático para purificar y proteger personas y lugares. Antiguamente, se quemaba en las habitaciones de los enfermos para purificar el ambiente. La utilizan para invocar la buena salud y se echa al agua del baño para purificarla. También, creen que fortalece la memoria y que oler su madera con frecuencia conserva la juventud. La usan para malestar del hielo, o frío del muerto. Usan las hojas cuando el hielo de un difunto pasa al niño recién nacido o a la madre o a una mujer embarazada, (al pasar cerca de un cadáver).

Ruda: Planta considerada poderosa que combate y rechaza todo tipo de maleficios. Es usada como fuerte ritual de protección. Consideran que al plantar a la entrada de la casa una ruda macho a la derecha y una ruda hembra a la izquierda, se absorben hechizos y maleficios.

Salvia: Creen que, comiendo un poco cada día, proporciona una garantía de larga vida, fomenta la sabiduría y que protege contra el mal de ojo.

Tomillo: Tradicionalmente, la queman para purificar el ambiente y librarlo de influencias negativas. También, le queman para atraer la buena salud, y para dormir sin pesadillas, se coloca bajo la almohada. Creen que esta planta tiene la potencialidad de reunir las energías de una persona, brindándole fortaleza.

Trébol: Es usado como amuleto de la buena suerte. La tradición antigua afirma que un trébol de dos hojas atrae a un amante; uno de tres hojas sirve de amuleto; uno de cuatro hojas atrae la riqueza y el amor; si tiene cinco hojas, es muy poderoso para atraer prosperidad y fortuna.

Verbena: Conocida como “Hierba sagrada” o “Hierba de la Gracia”. Es usada como protectora contra el mal. También para atraer prosperidad económica y ayudar al crecimiento de las cosechas.

En el Departamento del Chocó, Colombia, es crucial la preservación de los saberes ancestrales agroecológicos de su población originaria, a los fines de mantener la diversidad cultural y promover prácticas sostenibles en la agricultura. Ante el problema de la pérdida de vigencia y reconocimiento social de estos saberes, se propone continuar llevando a cabo acciones para su preservación y revitalización de este importante renglón garantía de su desarrollo.

La preservación de los saberes ancestrales agroecológicos en esta región, requiere de un enfoque integral que combine la recopilación, transmisión, valorización, apoyo institucional, investigación y desarrollo de estas prácticas tradicionales. Sólo a través de esfuerzos coordinados y sostenidos se puede garantizar la continuidad de estos conocimientos y su contribución a la sostenibilidad y diversidad cultural en la región.

REFLEXIONES FINALES

La agroecología, ciertamente, es ya asumida como una ciencia y una práctica científica, aun cuando su ejecución data de siglos atrás, cuando era de índole individual y comunitaria. Esta se mantiene activa como otra estrategia de carácter comunitario, cuando se vinculan las actividades económicas y técnicas con el tratamiento del suelo y el cultivo de plantas de diversa índole, y múltiples fines, como la medicina o la producción de alimentos, manteniendo la preservación y armónica relación de los seres vivos con el entorno natural y social, y con los conocimientos locales que poseen los sabedores. Los sabedores son considerados fuentes de sabiduría y juegan un papel crucial en la comunidad para la transmisión de estos conocimientos, sobre todo dan vigencia la visión de la Etnoeducación. De allí, la importancia de entender la estrategia de trabajo familiar y comunitario, como un intercambio de saberes sobre las especies de su territorio, las cuales usan los sabedores, para preservar la salud de su pueblo (Hernández-Cassiani, 2020).

Por otra parte, están las estrategias que desarrollan los científicos provenientes de la academia o de instituciones del Estado-Gobierno, o de Ong's con ese mismo fin. Este sector, desarrolla metodologías, tecnologías y actividades diversas para alcanzar una articulación exitosa del entorno comunitario y sus sabedores, las bondades productivas del territorio y sus propuestas de proyectos en pro de la agroecología. El proceso requiere identificar fortalezas, desafíos y oportunidades regionales que se encuentran arraigados en estos pueblos indígenas y afrocolombianos que habitan en el Chocó.

La vinculación efectiva entre los sabedores ancestrales del quehacer tradicional en salud y la articulación con las necesidades locales y comunitarias, conjuntamente con las mencionadas plataformas de Estado y academia, ya en ejecución, muestran la importancia de estas distintas herramientas y procesos; así como, la potencialidad de intercambiar el conocimiento propio de la región con el acervo científico que albergan las instituciones. Este esfuerzo es, en aras de garantizar no sólo la sostenibilidad; sino, la apropiación científica y la democratización del conocimiento en estos territorios abordados mediante el trabajo de organizaciones como Ong's, instituciones del Estado-Gobierno, instituciones privadas, universidades, centros de investigación, ministerios, entre otros entes.

Es importante especificar que, según se leyó en las investigaciones consultadas de Escalante y Martínez (2020); Valoyes y Palacios, 2020), Ledezma (2011), Gamboa y Mosquera (2014), y otros, los usos de estas plantas no sólo son para atender problemas de salud a nivel de prevención y procesos terapéuticos o curas de enfermedades a nivel primario; sino que, según los usos y costumbres tradicionales de los pueblos indígenas y negroides del Chocó; se pudo conocer la atención de la situación de salud a varios niveles.

Ciertamente, los investigadores coinciden en que, la población enfrenta una predisposición a enfermarse, debido a las condiciones de humedad, pluviosidad, condición precaria de viviendas y condiciones económicas de pobreza que originan la desnutrición; lo cual les conmina a hacer uso de las plantas medicinales, para resolver problemas de salud. En tal sentido, se reflexiona, que los pueblos con saberes ancestrales siguen teniendo presencia en las comunidades de indígenas, mestizos y sobre todo, en los afrocolombianos, dado el predominio de los saberes sobre plantas medicinales. E incluso, según los investigadores estudiados, se puede afirmar, que “el grupo étnico que usa una mayor cantidad de especies medicinales son la de los afrocolombianos” (Valoyes y Palacios, 2020:93).

Destaca, en estas tradiciones, el respeto por la naturaleza, ya que las comunidades indígenas y negroides tienen una profunda conexión espiritual con la tierra y reconocen su interdependencia con la naturaleza. Sus prácticas agroecológicas se basan en el respeto por los ciclos naturales, la di-

versidad biológica y el uso sostenible de los recursos, e incluyen estrategias de adaptación al cambio climático, manejo de suelos, control de plagas y gestión del agua. Saben que de ello depende la soberanía alimentaria, por ende, sus sistemas agrícolas tradicionales están diseñados en aras del alimento básico de sus comunidades.

Como aporte teórico y cultural hubo hallazgos que permitieron sistematizar y consolidar conocimientos existentes en estos contextos, sobre gran variedad de plantas usadas en salud. Como se explicó, sus prácticas agroecológicas ancestrales usaron la diversificación de cultivos, la selección de semillas según el entorno local y uso de técnicas de cultivo respetando el medio ambiente. Estas prácticas, estuvieron arraigadas a la igualdad, la participación comunitaria, la distribución equitativa de los recursos; situación que hoy está desdibujada ante los embates socio-políticos que enfrenta la región. Estas prácticas pueden ofrecer lecciones valiosas a todas las regiones del país; e incluso, a otras naciones, para enfrentar los desafíos ambientales actuales y futuros (Artunduaga, 1997).

Teóricamente, producto del análisis se pudo ofrecer una interpretación sobre la diversidad de saberes ancestrales en materia de salud y nutrición; reconociéndose que estos no se transmiten generacionalmente, hoy día. Como aporte teórico, además, se trabajaron teorías y conceptos que aportan al afianzamiento de la identidad étnica, al reconocimiento de su potencialidad agroecológica, a la inclusión de este tema en los planes de estudio, lo cual contribuye a mejorar la calidad de vida de la población. Se afirma en consecuencia que, las tradiciones y saberes ancestrales agroecológicos de los pueblos indígenas y negroides de Colombia son invaluable. Estas comunidades poseen un conocimiento arraigado en la tierra y en la experiencia acumulada durante generaciones, lo que les permite manejar, de manera sostenible, los recursos naturales y mantener un equilibrio armónico con el medio ambiente. Reflexionar sobre estas tradiciones implica posicionar una visión epistémica que reconoce la importancia de preservar y valorar estos conocimientos como parte fundamental del patrimonio de la humanidad.

Como Recomendaciones al cierre, se considera fundamental, posicionar la Etnoeducación en estas regiones. Esto es influirá en la valoración y revitalización de los saberes ancestrales, al reconocer la diversidad y promover el diálogo intercultural, el respeto por la cosmovisión de comunidades indígenas y negroides, y la transmisión de conocimientos desde una perspectiva holística y contextualizada. Al integrar los saberes ancestrales en los sistemas educativos formales e informales, se fortalece la identidad cultural, la autodeterminación de los pueblos y se consolida una sociedad más justa y sostenibles.

Especial interés debe dársele a la “transmisión intergeneracional de saberes”, pues esta práctica es esencial para su preservación cultural y de conocimientos prácticos para la buena salud y alimentación. Esto se puede lograr, por una parte, a través de programas educativos en las comunidades, talleres, charlas y actividades prácticas en las que los ancianos y expertos comparten su conocimiento con las generaciones más jóvenes. Y por otra, mediante la incentivación de la investigación y el desarrollo de prácticas agroecológicas basadas en los saberes ancestrales de la población originaria del Chocó; lo cual implica, obviamente, la colaboración entre científicos, expertos locales, sabedores autóctonos y agricultores, todo a los fines de adaptar y mejorar las técnicas tradicionales a las condiciones actuales. Es importante, continuar este tipo de investigaciones, para compilar y documentar los saberes ancestrales agroecológicos y otros temas afines, de la población originaria del Chocó.

Además, se considera importante promover la valorización y el reconocimiento de los saberes ancestrales agroecológicos dentro de la sociedad colombiana. Tanto a nivel local como a nivel nacio-

nal, debe destacarse el papel de la medicina ancestral y de los sabedores de estos pueblos. Esto puede lograrse a través de la promoción mediante redes y medios de comunicación social, y/o mediante ferias, festivales o eventos tipo Congresos, que destaquen la importancia de estos conocimientos para la sostenibilidad y la conservación del medio ambiente y la preservación de la cultura de los pueblos indígenas y negroides.

Como recomendación, se requiere apoyo institucional a todo nivel; en otras palabras, de autoridades locales y nacionales, en pro de la preservación de los saberes ancestrales y su consecuente aplicación en pro de la calidad de vida de la población. Esto implica, incluir en las políticas públicas el fomento de la agricultura sostenible, la protección de semillas criollas y el fortalecimiento de las prácticas tradicionales con plantas medicinales, entre otros saberes de estos pueblos indígenas y afrocolombianos de la región del Chocó.

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ENSAYO

Salvaguardar los derechos de la mujer: el viaje jurídico poscolonial de la india hacia la justicia de género

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Resumen. Haciendo hincapié en la evolución poscolonial, este ensayo examina cómo las reformas jurídicas han hecho avanzar la justicia de género en la India. A través del análisis de importantes medidas legislativas, cláusulas constitucionales y sentencias judiciales, el estudio trata de comprender cómo el sistema jurídico indio ha abordado los llamamientos en favor de la igualdad de género. La metodología del artículo adopta un enfoque doctrinal, examinando bibliografía secundaria sobre justicia de género, además de fuentes primarias, como leyes, jurisprudencia y artículos constitucionales. Esto incluye legislación histórica como la Ley de Protección de las Mujeres contra la Violencia Doméstica de 2005 y la Ley de Acoso Sexual de las Mujeres en el Lugar de Trabajo (Prevención, Prohibición y Reparación) de 2013, junto con importantes reformas legislativas como la Ley de Matrimonio Hindú de 1955 y la Ley de Sucesión Hindú de 1956 y sus enmiendas. Se amplía además que, aunque la sociedad india ha progresado bastante en la demolición de las estructuras patriarcales, queda mucho por hacer debido a mecanismos sociales y culturales profundamente arraigados. El estudio deduce la importancia del activismo judicial y de la acción afirmativa para la justicia de género a la hora de defender nuevas reformas legales y su aplicación práctica para alcanzar la realidad definitiva de la igualdad de género.

Palabras clave: género, igualdad, justicia de género, derechos, India.

Safeguarding women's rights: india's post-colonial legal journey towards gender justice

Abstract. With an emphasis on post-colonial developments, this essay examines how legal reforms have advanced gender justice in India. By looking at significant legislative actions, constitutional clauses, and court rulings, the study seeks to understand how the Indian legal system has addressed calls for gender equality. The article's methodology takes a doctrinal approach, examining secondary literature on gender justice in addition to primary sources including legislations, case law, and constitutional articles. This includes historic legislation like the Protection of Women from Domestic Violence Act, 2005, and the Sexual Harassment of Women at Workplace (Prevention, Prohibition, and Redressal) Act of 2013, along with major legislative reforms including the Hindu Marriage Act of 1955 and Hindu Succession Act of 1956 and their amendments. It is further amplified that, although the Indian society has progressed quite a lot in demolishing patriarchal structures, much is left due to deep-rooted social and cultural mechanisms. The study derives the significance of judicial activism and affirmative action for gender justice in arguing for further legal reforms and their practical implementation for reaching the ultimate reality of gender equality.

Keywords: gender, equality, gender justice, rights, India.

INTRODUCTION

Gender justice is fundamental to building a fair and inclusive society where everyone has equal access to rights, resources, and opportunities, regardless of gender. In a country like India, rich in various socio-religious practices, the battle for gender equality is very much tied up with the practices of culture and with legal reform. This research aims to analyze how India's legal architecture has been responding toward gender justice since the country gained its independence, considered as a philosophical attempt to bridge together the rich heritage of the country with the concept of challenging oppressive patriarchal systems. The Indian Constitution's sound equality provision forms any way of discussion on gender justice. The whole idea of articles 14, 15, and 16 is that everybody must be treated equally before the law. Accordingly, these provisions do not permit any gender-based discrimination. However, even with all these constitutional safeguards, gender justice is something which remains under the immense constraint of strong social practices, religious beliefs, and economic differences. The Indian Legislature has, over the years, tried to fix several differences in laws many times since Independence. The two most relevant acts of this sort are the Hindu Marriage Act of 1955 and the Hindu Succession Act of 1956 can be regarded as important toward ending male-centered legal systems.

The country has been called upon to ratify laws and courts since it is a signatory to other human rights instruments, including UDHR 1948 and CEDAW 1979. These treaties state that men and women must be provided equal opportunities at work, studies, and personal lives—an objective India has been striving for nationally for its citizens. However, this is very difficult in ascertaining equal equality between men and women in the vast legal apparatus. This would call for an involvement of all the three arms of the government and society at large together to work towards finding the many problems in the given task.

For that matter, it requires bold legislative action and judicial intervention for the strengthening of the rights and ensuring gender justice. However, the journey undertaken in this regard for substantive gender equality is far from its completion. Although India's legal system has managed to produce much change toward combating gender injustice, the barrier problems remain to this day in the form of cultural, economic, and social disparities. This paper aims to discuss the interface of old and new as to how India's post-colonial legal system has been subjected to changing gender justice demands.

OBJECTIVES

The article basically deals with the concept and the framework of gender justice in the Indian legal and socio-economic-cultural-political context. The agenda is to analyze the manner in which the post-colonial Indian legal system has approached the evolving demands of gender justice and equality through the means of legal reform, legislative enactments, and interpretation of constitutional provisions and activist role of judiciary. It further looks at the role of protective discrimination and affirmative action in advancing substantive gender equality and redressing structural inequalities. It addresses India's international commitments to gender justice through various treaties and how the state's obligations have informed its domestic laws of gender justice. The article therefore examines various constitutional provisions and legislative enactments as well as reviews landmark cases and notable developments of the law. It highlights stories of success and challenges arising in the process of advocacy for gender justice in India, in particular areas like employment, marriage, reproductive rights, and personal laws.

MATERIALS AND METHODS

This article uses a comprehensive exposition of the historical reforms and legislative enactments in India relating to gender justice. It also discusses some of the landmark judicial decisions which have influenced and guided the interpretation of gender justice in India. The article primarily employs a doctrinal method of research based on primary and secondary data. The primary data includes constitutional provisions, legislative enactments, international treaties, case-laws; and secondary data includes the academic literature on gender justice. Attention revolves around specific provisions of the Constitution, such as Articles 14, 15, and 16, which underpin gender justice. The legislative developments that contributed to the dismantling of certain patriarchal structures have also been assessed, such as the Hindu Marriage Act (1955), Hindu Succession Act (1956), and most recently the 2005 amendments to the Hindu Succession Act of 1956. The interpretation of the constitutional provisions and legislations by the Indian Judiciary in landmark cases such as Vishaka (1997) and Shah Bano Begum (1985), etc. have been discussed. The article also takes into consideration India's commitments under international treaties, such as the Universal Declaration of Human Rights (1948) and the Convention on the Elimination of All Forms of Discrimination Against Women (1982), to understand how the obligations reaffirmed in these international agreements, have contributed to socio-legal transformation in India. Through the legislative enactments and judicial decisions on issues such as equal pay for women, prevention of sexual harassment, and promotion of inheritance rights for women, the study emphasises on the legal developments highlighting a movement towards gender justice.

RESULTS AND DISCUSSIONS

Gender Justice: Concept and Meaning

Gender justice means that, 'no one be denied justice or discriminated only because of one's gender (sex)' (Singh, 2001). The term gender justice refers to a concept of justice which pertains to the social and juridical relations that prevail between the sexes (Molyneux, 2007). The concept of gender justice has various kinds of meaning. In the area of liberal philosophy, it is focused on thinking about subjective agency, rights and capacities; whereas in political science it is concerned with the constitution, processes of democracy and citizenship. In the area of law, the concept of gender justice can mean formal equal rights between men and women (Kapoor, 2007). It comprises of various components of justice, which ranges from simple equality to concepts of differentiated equality and protective discrimination.

Gender justice can be defined as 'the protection and promotion of civil, political, economic and social rights on the basis of gender equality. It is necessary for taking a gender perspective on the rights themselves, as well as the assessment of access and obstacles to the enjoyment of these rights for both women, men, girls and boys and adopting gender-sensitive strategies for protecting and promoting them' (Spees, 2004). The term gender justice is often used with reference to activities that advance women's rights through legal change or promote women's interests in social and economic policy. However, the term is only rarely given a precise definition and is often used interchangeably with notions of gender equality, gender equity, women's empowerment and women's rights (Goetz, 2007).

Gender Justice dreams of a society that is free of gender barriers, that is, a society where the individuals are not held back by implicit bias, stereotypes, or prejudice and can reach their full potential, whether at school, in the workplace, or in the community (Neeraja, 2013). Thus, it is a process which lays down the hope that it would eradicate the socially constructed differences between men and women. It means elimination of all forms of discrimination, exclusion, oppression and exploitation of women (Nawaz, 2013). These injustices against women are related to the unequal power equation in gender relations and stereotyped roles for men and women in the society (Chakrabarti & Chakrabarty, 2006). It is also deeply rooted in all philosophies including religion and culture. Thus, any attempt to wash away the inequalities and to uphold gender justice can be successful only if the social and cultural reasons for such injustice are addressed adequately. Various legislations have been adopted by the Indian Legislature so as to protect the interests of woman and promote gender justice in the country.

Gender Justice and the Obligations of Government in Independent India

Gender justice calls for ensuring the fair and equitable treatment, equality in opportunity, equality in access to resources to all individuals, and socio-economic and cultural empowerment irrespective of their gender. The elimination of oppressive regimes and patriarchal structures created by socio-religious-cultural traditions in the country is the key to achieving gender justice. The legal duty to take different measures for the promotion of gender justice in our country stems from the aspirations and ideals of the Constitution of India as well as from the provisions of various international human rights and other instruments.

The Constitutional Commitments

The Constitution of India expressly declares in its preamble that ‘we the people of India solemnly resolve to constitute India to secure the equality of status and opportunity to all its citizens. Therefore, one of the fundamental goals of the founding document of independent India is the upholding of gender justice. The preamble is an unenforceable part of the Constitutions; however, it is acting as an aid for the interpretation of various provisions of the Constitution and the judiciary has given due to recognition to the objectives emphasised in the preamble (Orgad, 2010). The operative and binding provisions of the Constitution gives due regard to the issue of gender injustice practised in the pre-colonial era and included specific provisions for ensuring right to equality among both men and women as well as to prevent discrimination on the ground of sex.

Part III of the Indian Constitution guarantees various fundamental rights and the State is under an obligation to protect these fundamental rights. Article 14 is the core provision which guarantees right to equality and equal protection of law to all individuals. It confers a duty on the state to give equal treatment to all. In this context, this essentially means that no privilege or favour should be given to anyone based on their gender. Article 14 also imposes an obligation to guarantee equal protection to all irrespective of their gender. Hence, in the context of gender justice, Article 14 incorporates both negative and positive contents (Fredman, 2016). Further, this Article also emphasises anti-arbitrariness; arbitrariness is one of the enemies of gender justice, and hence, it is specifically placed as an important virtue under this Article (*S.G. Jaisinghani v. Union of India*, 1967). Bhagwati, J emphasised that ‘Equality is a dynamic concept with many aspects and dimensions, and it cannot be imprisoned within traditional and doctrinaire limits. Article 14 strikes at arbitrariness in State action and ensures fairness and equality of treatment’ (*Maneka Gandhi v. Union of India*, 1978). Though apparently, Article 14 prohibits all types of classifications based on gender, the right to equality and equal protection of law guaranteed in it accommodates ‘reasonable classification’ (Saraswati, 2002). This is based on the principle ‘equals to be treated equally and unequal to be treated unequally’ (Seervai, 1995).

The Hon’ble Supreme Court of India in *Western U.P. Electric Power and Supply Co. Ltd. v. State of U.P. and Anr.* (1969) observed that ‘Article 14 of the Constitution ensures equality among equals; its aim is to protect persons similarly placed against discriminatory treatment. It does not however operate against rational classification’. Further, the Court states that, ‘the guarantee of equality does not imply that the same rules should be made applicable to all persons in spite of differences in their circumstances and conditions’ (*Chiranjit Lal Chowdhuri v. The Union of India & Ors.*, 1969). However, a classification is considered as valid if it satisfies twin requirements such as: there shall be an intelligible differentia, i.e. there has to be some reasonable criteria to distinguish between two classes; and such classification must have rational nexus with the purpose sought to be achieved by such classification (*Prabodh Verma and Others, etc. v. State of Uttar Pradesh and Others, Etc.*, 1984).

Non-discrimination is considered as one of the important facets of right to equality. According to Article 1 of the ILO’s Discrimination (Employment and Occupation) Convention, 1958, discrimination means, ‘Any distinction, exclusion or preference made on the basis of race, colour, sex, religion, political opinion, national extraction or social origin, which has the effect of nullifying or impairing equality of opportunity or treatment in the employment or occupation’. Therefore, right against discrimination presupposes equal treatment to all persons equally before law irrespective of gender also.

The right against non-discrimination is guaranteed under Article 15 of the Constitution of India. It states that, 'The State shall not discriminate against any citizen on grounds only of religion, race, caste, sex, place of birth or any of them'. The Article also prohibit denial of access on the ground of sex, to any 'shops, public restaurants, hotels and places of public entertainment; or to use of wells, tanks, bathing ghats, roads and places of public resort maintained wholly or partly out of State funds or dedicated to the use of the general public'. This prohibition ensures protection of social rights and prohibition on the ground of gender. In matters of public employment also, the Constitution of India guarantees fundamental right to equal access to opportunity for all citizens and it specifically prohibits any discrimination on the ground of sex (Article 16). Thus, the Constitution imposes a positive obligation on the state to ensure equality and a negative obligation to prohibit discrimination in matters of recruitment, promotion, working conditions and related matters of public employment (Motiwal, 1969).

The Constitutional imperative of gender justice is outlined in Articles 14, 15, and 16. Article 14 is put into effect by Articles 15 and 16, which are instances of guarantees of equality. These articles were effectively used by the Indian judiciary in several cases to uphold gender justice. The Court has dealt with several situations based on the equality and right against discrimination in relation to the discriminatory provisions in connection with holding of immovable property (*Sri Sri Mahadev Jiew v. Dr. B.B. Sen*, 1951); refusal to give admission in educational institution (*Anjali Roy v. State of West Bengal*, 1952); women's estate (*Rani Raj Rajeshwari Devi v. State of Uttar Pradesh*, 1954); status of marriage (*Radha Charan Patnaik v. State of Orissa*, 1969); classification of male and female officers (*Uma Sinha v. State of Bihar*, 1975); restriction to hold agricultural land (*Ambika Prasad Mishra v. State of Uttar Pradesh*, 1980); the different scale of pay (*Uttarakhand Mahila Kalyan Parishad v. State of Uttar Pradesh*, 1993); promotion to lady staff (*Hindustan Latex Ltd. v. Maniamma*, 1994); exclusion of women from employment as shed clerks in ports (*A.M. Shaila v. Chairman, Cochin Port Trust*, 1995); night shift (*R. Vasantha v. Union of India*, 2001); sex-based recruitment (*G.K. Pushpa v. State of Karnataka*, 2013); etc. The discriminatory service conditions on the basis of gender was dealt by the Hon'ble Supreme Court in the cases of *C. B. Muthamma v. Union of India* (1979) as well as *Air India v. Nergesh Meerza* (1981). The Court held that such provisions constitute violation of right against discrimination and hence are unconstitutional. In the case of *Anuj Garg & Ors v. Hotel Association of India & Ors* (2008), a prohibition to employment on the basis of sexual preference was held unconstitutional. The prohibition of entry into Sabarimala Temple on the ground of age of females were held unconstitutional in the case of *Indian Young Lawyers Association v. State of Kerala* (2019). The issue of gender discrimination in relation to the Permanent Commissions to women officers in the Army and Navy was also held unconstitutional in the cases of *Secretary, Ministry of Defence v. Babita Punya* (2020) and *Union of India v. Lt. Cdr. Annie Nagaraja* (2020). However, it is to be noted that, the Court has emphasised that sex can be ground for reasonable classification if the nature of the job so requires. It was so held in the case of *R.S. Singh v. State of Punjab & Haryana* (1972), wherein the Court has dealt with the issue of ineligibility in promotion to the post of Jail Superintendent on the basis of sex.

The equal treatment of both men and woman in all circumstance may appear fair at first, but it can occasionally result in gender injustice. Because such treatments may overlook the biological, social, and historical distinctions between the sexes as well as the specific challenges the women have endured as a result of centuries-old patriarchal traditions, economic inequality, and societal duties.

The Hon'ble Supreme Court points out that, 'the Articles 14 and 16 of the Constitution which is intended to advance justice by avoiding discrimination is attracted only when equals are treated as unequal's or where unequal's are treated as equals (Md. Usman & Ors. v. State of Andhra Pradesh, 1977). The Article 15(3) assumes great importance in this context as it allows the State to make special provisions in favour of women. This clause serves as an exception to the general rule of right against discrimination and equal treatment to both genders. This clause recognizes that, even in the face of equality as a basic principle, women and children may need extra assistance to overcome structural injustices and historical obstacles. Article 15(3) permits affirmative action, which in turn permits the State to carry out programs and policies including welfare, education, and job reservations, as well as legal protections that tackle gender-specific concerns and advance substantive equality. This exemption helps close the gaps left by long-standing social and economic inequalities, guaranteeing that gender equality is a genuine, substantive reality in everyday life rather than only a theoretical concept. Any provision which is manifestly discriminatory to men, and favouring to women for their empowerment is covered under Article 15(3), and such discrimination is termed as protective discrimination.

Protective discrimination means the policy of granting special privileges to the downtrodden and the underprivileged sections of society, in order to bring them at par with the mainstream society. The objective is to remove the inequality caused such sections of the society since ancient times. It is to be noted that due to their inherent vulnerability, the women need to be given special favorable treatment so as to make them equal with men in the society (Challa, 2014). The Hon'ble Supreme Court in the case of R. S. Singh v. State (1972) held that, 'the Constitution of India forbids any discrimination on the ground of sex alone. However, discrimination is permissible on ground of sex when there are a variety of other factors involved and there is a reasonable nexus with the object of classification'.

The judiciary has upheld several provisions including the provisions relating to the maintenance to wife (*Thamsi Goundan v. Kanni Ammal*, 1952); women reservations (*Dattatraya Motiram More v. State of Bombay*, 1953); outraging the modesty of women (*Girdhar Gopal v. State*, 1953), bail for women accused (*Chokhi v. The State*, 1957); service of summons to adult female (*M.I. Shabdad v. Mohd. Abdullah Mir*, 1967); special pay to female employees (*Shamsher Singh v. Punjab State*, 1970); property rights of Hindu female (*Partap Singh v. Union of India*, 1985); reservation in appointment of principal in women college (*Vijay Lakshmi v. Punjab University*, 2003); preferential treatment to women based on an action plan (*Air India Cabin Crew Association v. Yeshaswinee Merchant*, 2004); nomination of women members in Municipal Board (*Om Narain Agrawal v. Nagar Palika, Shahjahanpur*, 1993); special provisions for women in respect of employment or posts under the State (*Government of Andhra Pradesh v. P.B. Vijay Kumar and Another*, 1995); etc.

In *Yousuf Abdul Aziz v. State of Bombay* (1954), the Supreme Court upheld the validity of Section 497 of IPC which punishes only male participants in the offence of adultery and exempts the women from the punishments. The Apex Court relied upon the mandate of Article 15 (3) to uphold this provision. In a similar case of *Sowmithri Vishnu v. Union of India* (1985), the Court observed that it is commonly accepted that it is the man who is the seducer and not the woman. Women were not punishable for adultery because they were less likely to indulge in it. The court upheld the validity of section 497 IPC by stating that, 'the wife is a victim and not the author of crime' (Challa, 2012). In the landmark case of *Joseph Shine v. Union of India* (2018), the Hon'ble Supreme Court declared Section 497 as unconstitutional as it violates Articles 14, 15 and 21 of the Constitution of India.

Further, Article 39 (a) in Part IV of the Constitution of India mandates that, State shall ensure 'Equal right of men and women to an adequate means of livelihood' and Article 39(d) emphasises on 'Equal pay for equal work for both men and women, thus, addressing wage disparities based on gender'. Therefore, Articles 39(a) and 39(d), emphasize the state's commitment to gender equality in the workplace and economy. According to Article 39(a), the State must guarantee that men and women have equal access to a sufficient standard of living, thereby fostering equity in the distribution of economic resources and opportunities. The objective of this provision is to eradicate gender-based differences in income and employment, guaranteeing financial self-sufficiency for both men and women. This is also supported by Article 39(d), which addresses salary inequities that frequently affect women by requiring equal compensation for equal effort. This clause aims to address gender-based wage disparities and promote equitable compensation practices by requiring that those doing the same job, regardless of gender, receive the same compensation. Collectively, these Articles embody a constitutional pledge to eliminate economic disparities and guarantee women's equal access to financial security and just compensation, so advancing a more equitable community. Since, these obligations are placed under the Part IV, i.e. it is a directive principle of state policy and hence they are non-justiciable obligations (Article 37). However, these obligations were considered as fundamental to achieve the goal of gender justice in the country.

Further, the Articles 243D and 243T imposes an obligation to state to reserve one third of total seats in Panchayat and Municipalities. Women's active participation in grass-roots governance and decision-making processes is ensured by this obligatory reservation. These provisions seek to rectify the historical under-representation of women in public life and political institutions by requiring at least one-third of local bodies to be represented. By enabling women to participate in local public policy and community development, affirmative action promotes gender equality. The presence of women in these positions has been crucial in fostering inclusive growth, offering fresh viewpoints in governance, and efficiently addressing concerns pertaining to women. The aforementioned articles represent a significant advancement in the political empowerment and leadership of women in India. Thus, it can be seen that, the Indian Constitution provides a strong basis for guaranteeing gender justice in the country's post-colonial judicial system through Articles 14, 15, 16, 39, and 243D & 243T. Together, these provisions impose a duty on the state to eliminate patriarchal systems, enact legislation and introduce reforms to advance substantive gender justice within India's legal and social frameworks.

International Obligations

India is a signatory to several international human rights and other instruments. Most of the human rights treaties guarantee right to equality and right against discrimination as a fundamental human right. The Universal Declaration of Human Rights, 1948 in its Article 2 prohibits discrimination on the ground of gender; Article 7 guarantees right to equality to both men and women; and Article 16 recognises equal rights in marriage. The International Convention on Civil and Political Rights, 1966 in Article 3 imposes an obligation to ensure equal rights to men and women; and Article 26 guarantees right against discrimination and equality before the law. Further, the International Covenant on Economic, Social, and Cultural Rights, 1966, in its Article 2 guarantees right against discrimination; Article 3 confers equals rights to men and women; and Article 7 guarantees equal pay for equal work. Most importantly, the United Nations Convention on the Elimination of All Forms of Discrimination Against Women 1979 (CEDAW), imposes several obligations on the

states to ensure gender equality at the municipal level. Article 2 states that, 'States Parties condemn discrimination against women in all its forms, agree to pursue by all appropriate means and without delay a policy of eliminating discrimination against women and, to this end, undertake: (a) To embody the principle of the equality of men and women in their national level; (b) To adopt appropriate legislative and other measures; (c) To establish equal legal protection of the rights of women; (d) To refrain from engaging in any act or practice of discrimination against women; (e) To take all appropriate measures to eliminate discrimination against women by any person, organization or enterprise; (f) To take all appropriate measures, including legislation, to modify or abolish existing laws, regulations, customs and practices which constitute discrimination against women; (g) To repeal all national penal provisions which constitute discrimination against women'.

Article 5 of CEDAW also imposes an obligation to eliminate social and cultural practices which are against the gender equality. It provides that, 'States Parties shall take all appropriate measures: (a) To modify the social and cultural patterns of conduct of men and women, with a view to achieving the elimination of prejudices and customary and all other practices which are based on the idea of the inferiority or the superiority of either of the sexes or on stereotyped roles for men and women; (b) To ensure that family education includes a proper understanding of maternity as a social function and the recognition of the common responsibility of men and women in the upbringing and development of their children, it being understood that the interest of the children is the primordial consideration in all cases'.

Further, the Article 11 obliges the State parties to take measures to ensure equality in employment, equal pay and job security

Other international instruments such as Convention on the Elimination of All Forms of Racial Discrimination (Articles 1, 2, 4 & 5); Convention on the Rights of the Child (Article 2); Convention on the Rights of Persons with Disabilities (Articles 3-5); ILO Equal Remuneration Convention, 1951; ILO Discrimination (Employment and Occupation) Convention, 1958; Beijing Declaration and Platform for Action (1995); and Sustainable Development Goals, 2015 (Goal 5), etc. also obliges the state parties to ensure gender justice in their municipal legal systems. Both India's international commitments and its Constitutional obligations influence the country's role in advancing gender justice.

Gender Justice and Legislative Reforms

The efforts to improve the conditions and status of women in India were started during the British colonial era. The social reformers such as Mahatma Jyotiba Phule; Iswar Chandra Vidyasagar; Raja Ram Mohan Roy; Shahu Chhatrapati; and Swami Dayanand Saraswathi; etc. played a significant role in bringing about awareness regarding the need for removing the social evils and discriminatory practices against women prevailing in the society. During the colonial rule various laws were enacted by the government for abolishing certain evil practices against women. The effort was made in 1829 by enacting a law for abolition of Sati. In 1856, widow remarriage was made legal in the country. In 1870 female infanticide was banned. Further in 1872, inter caste, inter community marriage were made legal and in 1891, the age of consent was raised to 12 years of marriage. In 1921, the Act of granting voting rights to the women was passed in Madras Province and in 1929 the Child Marriage Restraint Act was passed (Saikia, 2012). Though various such legislative initiatives were taken by British government, the position of women was still vulnerable and they

were subjected to many atrocities and discriminations. After Independence the Indian government introduced numerous provisions to improve the social condition of women and to equip them with adequate means to utilize their potential for their betterment and contribute positively towards the growth of the country.

The notion of gender justice in India is closely interrelated with the changes in social and cultural fabric of Indian society. India has made great strides in gender justice, primarily due to critical legal changes meant to upend patriarchal systems and guarantee women's equality. These changes, which were put into effect by the Indian Parliament, are an attempt to bring the legal system up to date to comply with international responsibilities and the Constitution's values of gender equality. The most significant legislation that was introduced after post-colonial times in India, perhaps, was the enactment of legislations like the Hindu Marriage Act, 1955; Hindu Succession Act, 1956; Hindu Minority and Guardianship Act, 1956; and the Hindu Adoptions and Maintenance Act, 1956. They attempted to gain equality and eliminate varying unreasonable social provisions that continue to increase gender inequality. In addition, the Hindu Succession Act, 1956, was amended in the year 2005 to give equal rights of inheritance regarding the ancestral property by the son and daughter. Another legislative reform brought for gender justice by the Central government is the enactment of the Muslim Women (Protection of Rights on Divorce) Act, 1986. The Muslim Women (Protection of Rights on Marriage) Act, 2019 is otherwise known as the Triple Talaq Act. It is yet another important law that safeguards the rights of Muslim women and provides a solution to the problem of a husband giving divorce unilaterally.

Recently, the Indian government has quickly acted expediently in implementing many laws that have enhanced women's rights and protected them. These laws include many themes affecting women's rights and security in society. Its highest priorities have been the elimination of gender-based violence, work and economic equality, and fighting for women's rights in public as well as private domains. This wave of legislative reform speaks of a nation's commitment to gender justice and is consonant with both international obligations and constitutional ideals. Under the head of legislative endeavours, the Indian government has enacted several other laws that ensure gender justice. These laws can be divided into two: The first category comprises those specific legislations framed and enacted for the protection of women that include: Maternity Benefit Act, 1961; the Dowry Prohibition Act, 1961; Equal Remuneration Act, 1976; Sati (Prevention) Act, 1987, and Protection of Women from Domestic Violence Act, 2005; the Sexual Harassment of Women at Workplace (Prevention, Prohibition, and Redressal) Act, 2013; etc. The other one falls under those general laws that are applicable to all but also include provisions for women protection. This category includes Factories Act, 1948; Plantation Labour Act, 1951; Mines Act, 1952; Minimum Wages Act, 1948; and Inter-State Migrant Workers Act, 1979, etc. One of the major enactments for women protection is Protection of Women from Domestic Violence Act, 2005. The law offers civil remedy to the women subjected to any sort of physical, emotional, verbal, or financial domestic abuse. The Act is in complete contrast to the earlier law-it offers a holistic approach; immediately, the victim receives protection orders, residency orders, and financial compensation instead of criminalizing domestic abuse as done by the earlier laws. It also is comparatively easy to get counselling, medical assistance, and shelter houses. Importantly, the statute acknowledges the shift in contemporary family structures through its protection of women within cohabiting relationships. It symbolizes how the state views domestic violence as a serious problem that calls for penal measures and also provides support to the victims while they step into resuming their lives.

The most recently enacted legislation is the Sexual Harassment of Women at Workplace (Prevention, Prohibition, and Redressal) Act, 2013. An Act was enacted to provide that a safe and secure working environment is available for women both in the organized and the unorganized sectors. It provides that every organization must form internal complaint committee. It has a clear process for procedures to be followed in case a complaint of sexual harassment is made. It also provides penalties for violating its provisions. The Act was made as the rules to tackle the prevailing evil of sexual harassment at workplace were enunciated in the judgments of the case of *Vishaka v. State of Rajasthan*, in 1997, and was enacted when people were more conscious about this subject. It played a key role in laying the grounds for establishing the legal framework under which women, without fear of reprisal, could confront and disclose those abuses for greater safety and equity in the workplace.

The Maternity Benefit Act, 2017 was an important amendment that dealt with the rights of women at work. The Amendment India can now boast of having one of the longest maternity leave policies in the world. Paid maternity leaves for women working in both public and private employment are to be extended from 12 weeks to 26 weeks. Working from home shall also be possible subject to the woman's advance permission and if possible. Companies employing 50 or more employees are bound to provide crèche facilities. The variety of changes illustrates an effort by the administration to get more women in the workforce. This is to mean that maternity leave does not affect the growth of jobs or job safety.

It is also very commonly known as the Muslim Women (Protection of Rights on Marriage) Act, 2019. It is a big victory for Muslim women. According to this act, a man can divorce his wife by simply saying the word 'talaq' three times. This is said to be the third kind of talaq called 'talaq-e-biddat' or triple talaq, which, under this new law, is no longer legal for Muslim men to pronounce. Under the new law, this unfair practice will put Muslim women at risk of either homelessness, hard times financially, or mental anguish. The law deems 'triple talaq' as a serious crime for which the husband may face up to three years of imprisonment. This safeguarding of rights on behalf of the woman would also grant her a support allowance and the right to look after any minor children. The law has greatly aided gender equality among the Muslim population as justice is being dispensed for the women, such that they do not get to be sent off for a quick divorce without their rights being in place. The Protection of Children from Sexual Offences (POCSO) Act, 2012 has ensured the defense of little girls from sexual assault albeit the Act is so named as it is not just meant for children. Some of the graver punishments added to the Act with the latest amendments for sexual offenses against children are death for aggravated sexual assault. In a sense, the Act gives a gender-neutral framework, but it is especially important in helping young girls who are vulnerable and are dealing with the effects of sexual abuse.

More recent law that affects women's rights, especially with regard to reproductive autonomy, is the Surrogacy (Regulation) Act, 2021. By outlawing commercial surrogacy and permitting only altruistic surrogacy in certain circumstances, such infertility, the Act aims to control surrogacy. Although the law's goal is to stop surrogate mother exploitation, it has sparked discussion about how it affects women's autonomy and reproductive rights. While the Act protects surrogates from exploitation, it also limits surrogacy for unmarried women and LGBTQ+ individuals, underscoring the continuous debate over how to strike a balance between protection and autonomy. The Labour Ministry recently announced plans to begin enforcing the four rules on occupational health, safety, and working conditions, wages, social security, and industrial relations on April 1, 2021. The useless labor laws have been repealed by the government. There are currently four labor

codes that codify 29 labor legislation. The Code on Wages, 2019 and the Occupational Safety, Health and Working circumstances Code, 2020 are two codes that have special measures aimed at improving the working circumstances of women. The Code on Wages forbids wage discrimination based on gender and promotes the idea of equal compensation for equal effort. Closing the gender wage gap, which has long been a major obstacle to women's economic emancipation, requires this action (Chigateri, 2021).

The Occupational Safety, Health, and Working Conditions Code gives women employees the right to work in all kinds of workplaces, including night shifts, as long as proper safety and security measures are in place. It also requires yearly health examinations for women employees. The labor laws aim to establish more inclusive and fair working conditions for women in both the official and informal sectors by addressing concerns linked to workplace health and safety. Therefore, eliminating discrimination and empowering workers—including women employed in both organized and unorganized sectors—as well as their families are the goals of the new labor rules. Security, respect, health, and other welfare measures are therefore guaranteed. The enactment of laws by Parliament that uphold women's rights and eliminate discrimination based on gender has been essential in the advancement of gender justice (Rao, 2022) & (Kaur, 2024). Through the enactment of various legislations and amendments, the Parliament seeks to eliminate the historical injustices suffered by women in the name of gender (NHRC, 2021). Through a variety of legislative initiatives, India has addressed gender inequity, violence against women, and discrimination and achieved great strides toward ensuring gender justice. In line with international human rights standards and constitutional protections, these reforms have aimed to enhance women's social, economic, and political rights.

CONCLUSION

The Indian experience towards gender justice is a complex one because it tries to find a balance in the perpetuation of cultural and religious traditions, but also an occasion for heralding a promulgation of legal reforms which deconstruct patriarchal structures. Even though the legislation on Articles 14, 15, and 16 within the Indian Constitution theoretically sounds effective towards gender equality, it has been resisted deep through socio-cultural-religious norms. During legislative reforms such as the Hindu Succession Act and the Muslim Women (Protection of Rights on Marriage) Act, gender equality has been integrated through some much-needed forward movement, yet there are still further steps necessary for full gender justice. Yet it is still to this day and even going ahead with time in making a journey toward achieving true gender equality in India. These values of deep-rooted patriarchy, economic inequalities, and imbalances between education and job sectors still continue to impede the ways toward genuine gender justice. Going forward, collaboration between the state and society needs to be viewed in terms of taking up these challenges and effective implementation of the current legal frameworks.

Thus, in India there are many laws for promoting gender fairness; still, much improvement is required in the way these laws and rules are enforced. Changes in laws must be supported with strong ways to put them into action so that women's rights can be applied everywhere. Education is another field that requires reformation as it is very vital to break down the patriarchal norms. Curriculums which are gender sensitive must be introduced in schools and universities so as to promote equality, make a change to the existing stereotypes and empower both the genders so that they view themselves as equal contributors to the society. It has also become the need of the hour to make

a priority for the policies that focus on the economic empowerment of women, such as equal pay for equal work and access to entrepreneurial opportunities. Providing financial independence and opportunities for women will contribute significantly to reducing gender disparities. Last but not the least, it is necessary to conduct public awareness campaigns so as to address the biases existing in the society and it also helps in promoting gender equality. Community engagement can help in fostering a culture which has respect and equality for everyone and it would definitely help in eliminating long-standing discriminatory cultural practices and thus contribute towards a strong society with equality, respect, dignity and basic human rights for everyone.

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Garantizar la justicia social en la aplicación de la ley y las actividades judiciales: análisis de las normas internacionales y la práctica nacional

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Resumen. El artículo examina los aspectos teóricos y prácticos de garantizar la justicia social en las actividades judiciales y policiales y destaca cómo el Estado apoya la justicia social. El principal método de investigación es el análisis comparativo, que implica una revisión sistemática de las normas internacionales y nacionales que ayudan a equilibrar la justicia social, en particular en el contexto de los órganos judiciales y policiales (en el ejemplo de Ucrania). Se estableció que el estudio de los mecanismos para garantizar la justicia social, el desarrollo de nuevos enfoques para la implementación y mejora de las normas jurídicas existentes son las tareas más importantes para lograr altos estándares de orden público y garantizar una justicia justa. Como principio rector de la actividad de los órganos policiales y judiciales, la justicia social aparece, por un lado, como un concepto inconmensurable sin indicadores cuantitativos claros, lo que dificulta la evaluación en el contexto social y se basa en la percepción subjetiva de los individuos y sociedad. Por el contrario, la justicia social es un valor fundamental definido que está respaldado, garantizado y protegido tanto por estándares internacionales como por normas jurídicas nacionales.

Palabras clave: justicia social, actividad judicial, normas jurídicas, estándares internacionales, análisis comparativo.

Ensuring social justice in law enforcement and judicial activities: analysis of international standards and national practices

Abstract. The article explores the theoretical and practical aspects of ensuring social justice in law enforcement and judicial activities, highlighting how the state maintains social justice. The main method used in the study is comparative analysis, involving the systematic review of international and national standards that help balance social justice, particularly in the context of law enforcement and judicial bodies (using Ukraine as an example). It was found that studying mechanisms for ensuring social justice, developing new implementation approaches, and improving existing legal norms are crucial tasks for achieving high standards of law and order and ensuring fair justice. As a guiding principle for law enforcement and judicial operations, social justice appears, on one hand, as an immeasurable concept without clear quantitative indicators, making evaluation challenging in the social context and based on subjective perceptions of individuals and society. Conversely, social equity is a defined fundamental value, supported, ensured, and safeguarded by both international standards and national legal norms.

Keywords: social justice, judicial activity, legal norms, international standards, comparative analysis.

INTRODUCTION

Law enforcement agencies are the first line of protection of individual rights and public interest in general. These bodies are responsible for a number of defining tasks, which are united by a common sociological and legal structure. As a general rule, their activity is associated with the internal affairs bodies operation, although it is not limited by them (Korniienko, 2014) and involves the implementation of such functions as: 1) preventive (prevention of offenses that entail legal responsibility in the field of public law); 2) protective (life and health preservation, rights, liberties and interests of individuals); 3) public order, safety and property protection; 4) resocialization (this function is most typical for bodies and services in juvenile affairs, services that carry out administrative oversight of individuals released from correctional institutions); 5) operative and investigative; 6) investigation of crimes; 7) judicial review of cases; 8) consideration of cases on administrative violations; 9) consideration of cases on financial and administrative-economic offenses; 10) execution of verdicts, decisions, decisions and resolutions of courts, resolutions of inquiry and pre-trial investigation agencies and prosecutors (Maliarenko, 2014).

Along with this, human rights activities are actively implemented, which mostly means the movement for human rights and the activities of public human rights organizations, which are usually public non-governmental organizations, the main (title) task of which is the protection of individual's rights and liberties (Korniienko, 2014). Criticizing this thesis, we note that the function of protecting human rights and freedoms, for example, in Ukraine, is performed by the judiciary primarily through the administration of justice. Therefore, justice is correctly recognized as the most effective way of protecting individual's rights and liberties. It occupies a prominent place in

the system of guarantees for the defense of the latter, and access to it is an integral component of the right to appeal to the court and a necessary prerequisite for its implementation. Considering this, many scholars analyze the right to a fair trial and access to a court in the context of the human rights system (Chorna, 2021). However, it is worth noting that judicial activity appears as an independent type of legal activity, which has features of both law enforcement and defense of human rights. The court, performing judicial activity, can also perform purely law enforcement actions. However, unlike law enforcement, judicial activity has a broader subject, and therefore other principles of implementation, a broader state task (National Academy of Internal Affairs, 2024).

Such introductory identification material is given for a reason. In this way, we justify the independence of processes related to the law enforcement and judicial activities introduction in order to determine their key unifying commonality - the obligation to maintain the balance of social justice, which is a universally recognized value of a modern democratic society, which is enshrined in documents the world community, in particular in the International Covenants of the UN (Hrynenko, 2009). It is accepted that justice reflects the ethical nature of legality, while justice acts as a social and ethical criterion of law. In the process of implementing the current law, into which justice is introduced, the latter acquires legal features that determine its official level (Samokhvalov, 2006). Currently, social justice is considered an important tool for restructuring the law enforcement agencies arrangement, as well as the main postulate of the activities of judicial authorities. Therefore, we see that an in-depth study of mechanisms for ensuring social justice in the proposed context will contribute to the development of new approaches to their implementation, as well as to the improvement of existing legal norms, which are key tasks for achieving high standards of law and order and ensuring fair justice.

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

Discussions about justice have a long-lasting tradition: from *The Republic*, created by Plato, in which the author conducts a dialogue on the topic of what justice is and why it is necessary to be just in the interests of each person (Britannica, 2024) to *The Theory of Justice* by John Rawls (Davies, 2018), who argued that justice is the supreme virtue of social institutions and truth is the supreme virtue of systems of thought. Each of the identified and other prominent works in ethics or philosophy state that justice is actually part of the core of morality (Velasquez, Andre, Shanks, & Meyer, 2014). In the context of fair trial and law enforcement, justice is considered as a relevant principle. Its essence was for the first time revealed by Aristotle in his treatise “*Politics*” above 2000 years ago. According to the thinker, “justice consists in a certain equality, and in fact it happens, but it does not apply to everyone, but only to equals. Inequality is imagined as justice and is so in reality, but it also does not apply to everyone, but only to the unequal” (Aristotle, 2000). Currently, this notion is occasionally interpreted as: “all individuals must be treated the same way, only differing in relation to the circumstances they find themselves” (Velasquez, Andre, Shanks, & Meyer, 2014). In addition, the philosopher claimed: “The concept of justice is connected with the idea of the state, because it regulates the principles of political association. Instead, justice is the measure of justice” (Aristotle, 2000).

Socrates believed that justice is following wisdom, true knowledge, order of things, laws. He identified it with truth and wisdom. The philosopher emphasized: if a person understands what is moral and fair, and uses this knowledge in practice, then he is really a reasonable and fair person (Suveilan, 2001). At the same time, the implementation of justice, according to I. Kant, is reflected

in his “golden rule of morality”, when a person is faced with a choice: to be honest and fair or not to consider the interests of others (Komarova, 2008).

The classic definition of the essence and attributes of “justice” was given by the American sociologist K. Popper. According to him, justice was equal distribution of the burden of citizenship, that is, those restrictions on freedom that are necessary for social life; equality before the law, of course, when laws do not support or condemn individual citizens, groups or classes; impartiality of citizenship; equal use of benefits (and not only restrictions) that the state can offer to citizens (Komarova, 2008). Under modern conditions, the considered category as ethical is a socio-psychological perception of the principles and forms of organization of society that correspond to the interests of people and social groups, that is, a generalized moral assessment of social relations (Shumna, 2012). It is necessary to add that the political science encyclopedic dictionary interprets social justice as a correspondence between the practical role of various individuals in the life of society and their social position, between action and retribution (Political science encyclopedic dictionary, 1997). From the point of view of economic science, this category means one of the most essential values of social life, which “presupposes the balance of rights and duties of citizens. Justice as a moral, legal category is one of the principles of law and the most important notion of the rule of law (Shemshuchenko, 2004). Therefore, it is quite logical that ensuring social justice in law enforcement and judicial activities has always attracted considerable interest from both scientists and practitioners, since the level of trust of citizens in state institutions, the stability of the legal system and the provision of human rights depends on the effectiveness of these processes. For example, the Ukrainian scientist V. Sokurenko studied the growing role of the notion of social justice in the activities of the police in the process of building a legal social state (Sokurenko, 2002); N. Fedina, - modern understanding of justice in the affairs bodies operation (Fedina, 2014); K. Marysyuk and N. Slotvinska, - the notion of justice and its position in the network of penalty principles (Marysyuk & Slotvinska, 2021); N. Shelever, - the notion of justice and its implementation by the Constitutional Court of Ukraine (Shelever, 2020); K. Lehkykh, - justice as a principle of activity of national courts (Lehkykh, 2020). In our opinion, in modern conditions, when society is becoming more and more demanding of the transparency and legality of the actions of law enforcement and judicial bodies, the scientific and practical analysis of these issues becomes especially relevant.

MATERIALS AND METHODS

In this case, we consider the paradigm of ensuring social justice in law enforcement and judicial activities through the prism of international standards and national practices. International normative acts (UN, EU, OSCE, etc.), Ukrainian legislation, scientific and analytical studies related to the effectiveness of law enforcement and judicial activities in Ukraine, as well as advisory acts related to the optimization of procedures for ensuring justice and the judicial system serve as materials for conducting this study.

The main scientific method underlying its implementation is comparative analysis, which is based on the systematic study and comparison of international and national standards that contribute to ensuring the balance of social justice in general and in the context of the activities of law enforcement and judicial bodies (on the example of Ukraine). However, the research also used the method of theoretical generalization, analysis and synthesis, critical analysis, and formalization, which collectively ensure its complexity and integrity.

RESEARCH RESULTS

The analysis of ancient Greek literature makes it possible to conclude that justice in the context of law enforcement and judicial activity can be considered from three positions:

- firstly, how law enforcement and judicial institutions of society ensure a fair distribution of benefits and burdens between members of society;
- secondly, how to maintain a balance between the committed offense and the measure of punishment for it during the administration of justice (this is about the so-called “retributive justice”, that is, how justice is restored);
- thirdly, as compensation for victims, i.e. the extent to which people receive fair compensation for the damage caused to them (compensation that is proportional to the damage caused is considered fair).

There can be a long debate on each of these aspects, for example how to assess whether compensation for a person’s death is fair and how to determine that proportion. However, such questions do not have unequivocal answers and require thorough analysis and consideration of numerous factors that arose during consideration of a specific situation. For example, the value of human life and health is not only an economic, but also an ethical and legal issue that concerns the deep principles of justice and moral justice. The assessment of these compensations should be based on a comprehensive approach that takes into account both material and non-material damages, the suffering of relatives, the social context and many other aspects. It is important to realize that justice in such cases should be not only formal, but also subjectively perceived as fair by the parties to the proceedings. Lawyers, judges, legislators and society in general face this task, they have to find a balance between different interests and values in order to ensure true justice. In general, spirituality of justice is related to the content of the concepts of social stability, interconnectedness and equal dignity.

Various kinds of things are considered just or unjust: not only laws, institutions, and social systems, but also various actions, including judgments, verdicts, and accusations (Rawls, 2024). We also call fair the attitude of people, as well as people themselves.

It should be noted that law enforcement officials have the authority to use force to achieve the legitimate objective by law enforcement. However, this power cannot be abused. In order to prevent abuse of force and infringement of individual’s rights in law enforcement operation, it is necessary to develop and adopt standards of behavior based on international human rights documents, and conduct appropriate training. Such standards should cover not only legal aspects, but also ethical norms that ensure fairness, impartiality and equality for all citizens, regardless of their social status, ethnicity, religious beliefs or other characteristics.

These standards must be adapted to national conditions and integrated into domestic legislation, while maintaining compliance with international legal norms and state obligations. Adherence to these standards should become mandatory for all law enforcement officers.

For example, Art. 6 of the Law of Ukraine “On the National Police” defines that the rule of law notion is guiding for the police officers in their activities. This rule is applied considering the ECHR practice. Besides, clause 5 of Article 7 of the Law prohibits any privileges or restrictions based on race, skin color, political, religious and other beliefs, gender, ethnic and social origin, property status, place of residence, language or other characteristics in the police functioning (About the National Police, 2015; Fedina, 2020). It is noteworthy that the principle of justice is not mentioned

in the Law. Moreover, it is important to ensure constant monitoring and control of the implementation of these standards, in particular through the creation of independent supervisory bodies or institutions that would have the authority to conduct investigations into possible violations and bring those responsible to justice. An important aspect is also education and training of the employees of law enforcement institutions on human rights issues, which will contribute to the formation of the necessary skills and knowledge in them to exercise their own powers in a manner that meets international standards.

Thus, the implementation of the specified standards of conduct, based on international human rights documents, is a necessary condition for ensuring justice and legality in law enforcement operation.

At the same time, European fair trial standards are enshrined in a number of European international documents - international treaties, which, depending on their legal force, are mandatory or have a recommendatory nature. For example, European international legal acts in this area are the Recommendation No. (94) 12 on the independence, the Convention for the Protection of Human Rights and Fundamental Freedoms of 1950, the Conclusions of the Advisory Council of European Judges for the Committee of Ministers of the Council of Europe of various years, effectiveness and role of judges (adopted by the Committee of Ministers of the Council of Europe at the 518th meeting of the Deputy Ministers on October 13, 1994), the European Charter on the Status of Judges of 1998, etc. (Tsvyrkun, 2023).

Consequently, pursuant to Art. 2 of the Law of Ukraine “On the Judiciary and the Status of Judges”, the court, in the course of dispensation of justice, ensures the right to a fair trial and respect for other rights and freedoms guaranteed by the Constitution and laws of Ukraine, as well as international treaties ratified by the legislator; Art. 57 of this Act states that the newly appointed judge takes an oath, which contains the requirement to be fair (On the judiciary and the status of judges, 2016; Fedina, 2020).

Overall, international human rights law imposes commitment on national governments to behave in a particular way or abstain from targeted actions to contribute to protecting individuals' rights and liberties.

Establishing integrated body of human rights law – the universal code defended by an international standard to which all countries can adhere is one of the merits of the United Nations created. The latter has identified a broad spectrum of internationally recognized rights, including civil, cultural, economic, political and social ones (United Nations, 2024). It also created arrangements to promote and protect these rights and to help Member States to fulfill their responsibilities. The basis of this body of laws is the UN Charter and the Universal Declaration of Human Rights, which were adopted by the General Assembly in 1945 and 1948, respectively.

Each signatory country is responsible for complying with the Universal Declaration of Human Rights in its entirety. At the same time, the specified document contains a number of articles, the provisions of which are of particular importance in law enforcement and judicial activities, namely: everyone has the right to life, liberty and the security of person (Art. 3); nobody should be exposed to tortures or the reference severe, brutal or humiliating advantage and punishment (Art. 5); everyone is equal before the law and has the right without any discrimination to equal protection of the law (Art. 7); the right to be free from arbitrary arrest or imprisonment (Art. 9); anyone accused of a crime is entitled to the rights of fair trial, a trial at an independent and impartial court, presump-

tion of innocence until proven guilty and punishment only as decided by the competent court (Art. 11(1)); “every person shall be entitled to freedom of expression, including freedom to hold opinions (Art. 19) (United Nations, 1948).

CONCLUSIONS

Thus, summing up, it can be noted that:

- firstly, justice is a philosophical concept that has a different depth of understanding, and its measure is a system of numerous factors;- secondly, the law enforcement and judicial activity of the state, according to the main postulates of state formation, must axiomatically be fair from the point of view of the procedural aspect, and its definition as such must be based on the perception factor (modal/psychological/ideological discourse) and the legality factor (legal / practical implementation discourse);

- thirdly, in accordance with the norms of international human rights law, every person is provided with the possibility of a constant sense of justice both for himself and in the context of meeting his own private needs, which do not prevent fair treatment of others;

- fourthly, society as the main “customer of public services” has the right to expect from the law enforcement and judicial systems the provision of visible and tangible justice during the implementation of any contacts with their representatives, as well as building relationships among themselves.

So, as a guiding principle of the operation of law enforcement and judicial structures, justice appears, on the one hand, as something immeasurable and not always concretely defined, because it does not have quantitative and qualitative indicators that can be properly evaluated in view of the social context and subjective feelings separately individual, as well as society in general. On the other hand, justice is a fundamental value that is defined, ensured, protected and protected by international standards and national norms. The duty of representatives of law enforcement and judicial structures is to observe the procedures and practices of exercising their own powers, which according to the idealized model of identification are already permeated with its conceptual content. However, in the absence of such conceptual content, internal ideological attitudes must be activated, which will not allow justice to remain only an abstract ideal.

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Procesos de transformación en el ámbito social bajo la ley marcial: retos y oportunidades

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Resumen. El propósito del estudio es analizar los cambios transformadores en la esfera social de Ucrania e identificar los desafíos y oportunidades actuales para el desarrollo de la esfera social. Se da el número aproximado de refugiados de Ucrania registrados en Europa y Asia a 12 de marzo de 2023, por país de destino. Se establece que la ley marcial ralentiza la economía, lo que provoca un aumento del desempleo y una disminución del nivel de vida. Se analiza la dinámica del PIB per cápita para 2013-2022 y la dinámica del desempleo en Ucrania en 2019-2023. Se determina que los acontecimientos militares en Ucrania crean una serie de problemas complejos, que van desde el impacto traumático en la población hasta desafíos significativos en el ámbito de la recuperación socioeconómica y la asistencia humanitaria. El autor analiza el daño a la esfera social a partir del 1 de enero de 2023 y presenta la estructura regional de las instituciones sociales afectadas. La atención se centra en el aumento significativo de los costos de la seguridad social. A pesar de las dificultades de la ley marcial en Ucrania, las principales oportunidades para el desarrollo de la esfera social incluyen la restauración de la infraestructura, la reforma del sistema educativo, el desarrollo de la rehabilitación médica y el apoyo psicológico. Ucrania puede convertirse en un centro de servicios psicológicos y apoyo humanitario,

así como desarrollar servicios sociales para grupos vulnerables. La participación de los ciudadanos y de los voluntarios contribuirá al desarrollo estable de la esfera social en el contexto de la recuperación de la posguerra.

Palabras clave: esfera social, desafíos, oportunidades de recuperación, ley marcial, grupos vulnerables.

Transformation processes in the social sphere under martial law: challenges and opportunities

Abstract. The purpose of the study is to analyze the transformational changes in the social sphere of Ukraine and to identify current challenges and opportunities for the development of the social sphere. The approximate number of refugees from Ukraine registered in Europe and Asia as of March 12, 2023, by country of destination is given. It is established that martial law slows down the economy, leading to an increase in unemployment and a decrease in living standards. The dynamics of GDP per capita for 2013-2022 and the dynamics of unemployment in Ukraine in 2019-2023 are analyzed. It is determined that the military events in Ukraine create a number of complex problems, ranging from traumatic impact on the population to significant challenges in the field of socio-economic recovery and humanitarian assistance. The author analyzes the damage to the social sphere as of January 1, 2023, and presents the regional structure of the affected social institutions. Attention is focused on the significant increase in social security costs. Despite the difficulties of martial law in Ukraine, the main opportunities for the development of the social sphere include the restoration of infrastructure, reform of the educational system, development of medical rehabilitation and psychological support. Ukraine can become a center for psychological services and humanitarian support, as well as develop social services for vulnerable groups. The involvement of citizens and volunteers will contribute to the stable development of the social sphere in the context of post-war recovery.

Keywords: social sphere, challenges, opportunities for recovery, martial law, vulnerable groups.

INTRODUCTION

Russia's invasion of Ukraine will have not only devastating economic consequences as it leads to the destruction of businesses, infrastructure and agriculture, closure of companies and loss of jobs, which is an inevitable result of martial law; but also a broad negative social effect - increased unemployment, growth in the number of displaced persons and people who have lost their homes, growth of the population temporarily under occupation, increased migration, impoverishment of the population, increased social insecurity of socially vulnerable groups of us. In addition, the hostilities increase the threat of socio-economic instability. A significant number of people are leaving the country due to the threat of insecurity and loss of employment opportunities, especially highly qualified professionals, who are a strategically important resource for economic development. The complete or partial destruction of schools, hospitals and other social institutions leads to a loss of access to education and healthcare services, which is particularly critical for children, the elderly

and people with disabilities. The loss of jobs and destroyed infrastructure has the greatest impact on vulnerable groups, including low-income people, leading to increased social inequality and reduced opportunities for improving living standards. Decreased business activity and job losses lead to a significant reduction in social contributions used to finance social programs and infrastructure. Stress, anxiety, and the constant threat of insecurity significantly worsen the mental health of the population, and traumatic events and the loss of loved ones lead to the spread of post-traumatic stress syndrome (PTSD) and other mental health problems. The growing need for humanitarian aid and medical services is becoming an important challenge for both the national and international community.

In addition, the issue of social rehabilitation of the military is becoming an urgent one, which is important in the context of the social consequences of war. Military personnel who have participated in combat operations may face post-traumatic stress disorder (PTSD) and other mental health issues. It is also important to provide the military with access to high-quality medical care for the treatment of physical injuries and rehabilitation. An important task is to create conditions for the successful social integration of commissioned and discharged military personnel into civilian life through vocational rehabilitation, support in finding a job, and creating a favorable environment for their return to society. Providing psychosocial and social support for military families is also important, as families may face stress, changes in family environment and financial difficulties. Social rehabilitation should also include measures to protect the rights of veterans, including access to housing, medical care and other social services.

In sum, martial law has a significant negative impact on all spheres of life, from the economy and education to the mental health of the population. Overcoming these challenges will require a comprehensive and long-term approach on the part of the government and the public with the support of the international community, so there is a need to monitor the transformation processes in the social sphere to prepare adequate changes to social policy and to work proactively to assess the possible mitigation of the all-encompassing crisis in the social sphere and the growth of social tensions in society.

ANALYSIS OF THE LATEST RESEARCH AND PUBLICATIONS

The short-term social consequences of the war are terrible (Barceló, 2021): destruction of infrastructure (educational institutions, government agencies, medical facilities), weakening of economic and political institutions (reduced ability to finance the social sphere), human losses, an increase in the number of people in need of rehabilitation, social support, more people with disabilities, etc. Currently, there is no consensus in the scientific community on the long-term consequences of the war for society and development outcomes.

H. J. Colletta and M. L. Cullen, in their study of the World Bank, noted that the United Nations High Commissioner for Refugees (UNHCR), the United Nations Development Program (UNDP), and the World Bank have initiated programs that, according to the Brookings Institution, are aimed at reducing the gap between humanitarian aid and long-term development measures in countries after military conflicts. This transition from humanitarian assistance in times of conflict to development and peace efforts is becoming necessary due to socio-economic, political and psychological challenges in an uncertain security environment. Current responses to these challenges are insufficient due to the different approaches, institutional structures and funding systems of the

two types of actors - humanitarian and development. Humanitarian aid is usually characterized by fragility, and donors often show little interest in transition. Humanitarian operations are focused on rapid response and short-term planning, while development agents are often slow and inflexible. These two approaches tend to focus on their mandates rather than on the real needs of those affected by war. To address this gap, multilateral and bilateral institutions need to become more coherent in their strategies and operations. Joint missions of international organizations to West African countries such as Sierra Leone, Liberia and Guinea demonstrate the possibilities of governance in the realities of the sub-region. Focusing on cross-border issues, such as refugee and arms flows, natural resources, and security concerns, promotes synergies and improved coordination of policies and social programs at the local level (Colletta et al., 2000).

War inevitably and drastically changes social development and social cohesion, transforming development in the opposite direction: their legacy is permanent underdevelopment due to the weakening of local and national political institutions, the destruction of social protection, and the division of the population by removing the basis of norms, values and interpersonal and group trust that promotes interpersonal cooperation (Colletta et al., 2000; Kijewski et al., 2018). According to this view, armed conflicts have been found to negatively affect tangible factors such as investment, income, and consumption of individuals (Kijewski et al., 2018.), as well as less tangible elements such as psychological well-being and social trust (Deininger, 2003).

Among the positive effects of martial law on the social sphere are transformational institutional changes and changes in social priorities (Cramer, 2006; Morris, 2014; Verkhovod et al., 2023). Current research on the long-term impact of hostilities shows that those citizens who have suffered more from the war are more actively involved in broader collective activities after the conflict. This suggests that exposure to violence during war increases prosocial behavior. For example, J. Barzelo studied the impact of the intense conflict during the Vietnam War on Vietnamese society and conducted a representative survey in contemporary Vietnam, which includes the history of respondents' migration. The author concludes that conflict-affected individuals tend to be more involved in social organization and hold more distinct values, at least 26 years after the individual was involved in the war. Furthermore, the author found evidence that both individual persistence and community cohesion jointly explain the long-term increase in civic engagement. The results showed that individuals who lived in a province that was heavily affected by conflict during the war tended to be more involved in social organizations and have more distinct values, at least 26 years later (Barceló, 2021). The purpose of the study was to analyze the transformational changes in the social sphere of Ukraine and to identify current challenges and opportunities for the development of the social sphere.

MATERIALS AND METHODS

To achieve this goal, the appropriate methods were chosen. First of all, it is an analysis of literature sources to identify existing studies on the effects of military operations on the social sphere and the structure of society. This allowed us to form a basic understanding of the challenges faced by the state and society after the end of the war in the short and long term. The method of abstraction, as a universal approach, was also used to identify specific consequences that have a direct impact on the social sphere. The paper also uses the method of deduction, which allows us to study the challenges for the social sphere of Ukraine. This method facilitates the transition from generalizing general patterns to specific manifestations. In formulating the conclusions, the methods of systematization and generalization were used, which helped to summarize the results of the study.

RESEARCH RESULTS

Military conflicts have serious social consequences that can affect society for a long period after the end of the war. A year and a half after Russia's full-scale invasion, Ukraine has retaken 54% of the occupied territory, while Russia still occupies 18% of the country. During the 2023 offensive, Ukraine made minor territorial gains, but the front line remained stable for almost a year. Both sides have dug in, making breakthroughs increasingly difficult, and the number of military casualties has risen to about half a million on both sides. Meanwhile, Russia continues to bomb Ukrainian cities and blockade ports, and Ukraine has stepped up drone attacks on Russian ships and infrastructure (War in Ukraine. Center for Preventive Action, 2023). In Ukraine, large-scale military operations result in a large number of dead, wounded and maimed, which causes trauma and stress for families and society as a whole. Wounded soldiers need long-term medical and social support. There is also population migration, internal displacement, and an increase in the number of refugees and homeless people. Russia's constant missile and drone attacks lead to the destruction of cities, roads, infrastructure, schools and other facilities, which affects the development of society by disrupting traditional social structures. Martial law depresses the economy, leading to increased unemployment and lower living standards.

Since January 2022, Ukraine has received almost \$350 billion in aid, including \$77 billion from the United States. By the end of 2023, donor fatigue is evident. The fighting and airstrikes have caused a significant number of civilian casualties, with 5.1 million people internally displaced and 6.2 million migrating from Ukraine. About 17.6 million people are in need of humanitarian assistance (War in Ukraine. Center for Preventive Action, 2023).

The Office of the United Nations High Commissioner for Human Rights (OHCHR) has confirmed a total of 9,614 civilian deaths during the Russian invasion of Ukraine as of September 2023. 17,535 injuries have also been reported. However, OHCHR clarified that the actual numbers may be higher. The highest number of deaths was recorded in March 2022 - more than 3.9 thousand. The Russian government authorities report data on the deaths of Ukrainian military, but at the moment they cannot be verified, so they should be treated with caution (Number of civilian casualties in Ukraine during Russia's invasion verified by OHCHR from February 24, 2022 to September 10, Statista, 2023). The Ukrainian authorities do not disclose casualties among their military.

Despite the fact that the flow of refugees from Ukraine is not as critical as it was at the beginning of the military invasion, the total number of people who migrated from Ukraine is reaching a significant level. As of December 31, 2022, almost 1.3 million refugees from Ukraine were registered in Russia due to the Russian invasion (Table 1).

In addition, approximately 970,000 were in Poland after leaving Ukraine as of September 3, 2023. In total, about six million Ukrainian refugees were registered in Europe and 6.2 million worldwide as of September 2023. Most of them left the country by crossing the border with Poland. As of September 2023, almost 1.09 million refugees from Ukraine were registered in Germany. The first increases in the number of Ukrainian refugees were registered in March and April 2022. At the end of January 2023, the German authorities officially counted more than one million refugees. The German authorities have offered the highest monthly cash assistance to Ukrainians fleeing the war compared to other European countries. Members of the European Union (EU) implemented the Temporary Protection Directive (TPD), which guaranteed refugees from Ukraine access to housing, social security, and medical care.

TABLE 1. Estimated number of refugees from Ukraine registered in Europe and Asia since February 2022 as of September 12, 2023 by the largest countries of destination.

Country	As of the date of	The number of refugees	Country	As of the date of	The number of refugees
russia	31.12.22	1275315	Estonia	01.09.23	50450
Germany	03.09.23	1086355	Lithuania	07.09.23	49970
Poland	03.09.23	968390	Turkey	24.08.23	43670
Czech Republic	9.10.23	368300	Sweden	07.09.23	41055
United Kingdom	01.08.23	210800	Denmark	27.08.23	39680
Spain	03.09.23	186125	Latvia	15.08.23	32470
Italy	11.08.23	167525	Belarus	01.08.23	32435
Moldova	9.10.23	116615	Georgia	25.07.23	27000
Slovakia	27.08.23	107415	Greece	30.06.23	25050
Netherlands	26.05.23	94415	Croatia	08.09.23	23070
Ireland	9.10.23	93810	Cyprus	27.08.23	18225
Romania	9.10.23	86810	North Macedonia	03.09.23	17315
Belgium	22.08.23	73095	Slovenia	04.09.23	10140
France	31.12.22	70570	Luxembourg	11.08.23	6065
Austria	9.11.23	68700	Serbia and Kosovo	31.08.23	5710
Switzerland	05.09.23	65800	Azerbaijan	28.08.23	4610
Bulgaria	9.12.23	65765	Albania	07.06.23	3800
Finland	9.10.23	61060	Iceland	21.08.23	3250
Portugal	04.06.23	56995	Malta	06.08.23	2235
Norway	30.08.23	56970	Armenia	17.07.23	605
Montenegro	04.09.23	56915	Liechtenstein	05.09.23	520
Hungary	03.09.23	53375	Bosnia and Herzegovina	27.08.23	190

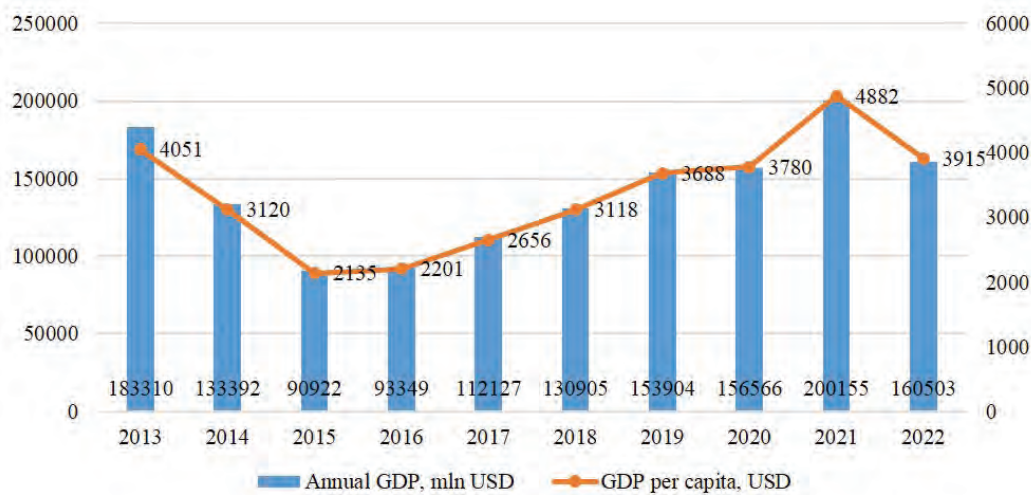
Estimated number of refugees from Ukraine recorded in Europe and Asia since February 2022 as of September 12, 2023, by selected country. Statista, 2023.

Those fleeing the war were entitled to a residence permit in the EU, access to the labor market, and education for their children. The protection was granted for one year from the beginning of the war in February 2022, but it could be extended in the future depending on the situation in the country. Thus, Poland, Germany, and the Czech Republic had the highest number of people registered for temporary protection in the EU (Estimated number of refugees from Ukraine recorded in Europe and Asia since February 2022 as of September 12, 2023, by selected country. Statista, 2023).

As of May 23, 2023, there are approximately 5.1 million internally displaced persons in Ukraine, according to the international migration portal. More than half of all IDPs (60%) reported being displaced for one year or longer (Internally Displaced Persons (IDPs). Migration data portal, 2023).

The war affects people's incomes. Due to the decline in business activity, the level of material security is deteriorating, as evidenced by the decline in GDP per capita (Figura 1). This indicator indicates the general state of well-being of the population.

Figura 1. Dynamics of GDP per capita in 2013-2022 (GDP in Ukraine falls 29.1. Country Economy, 2023).

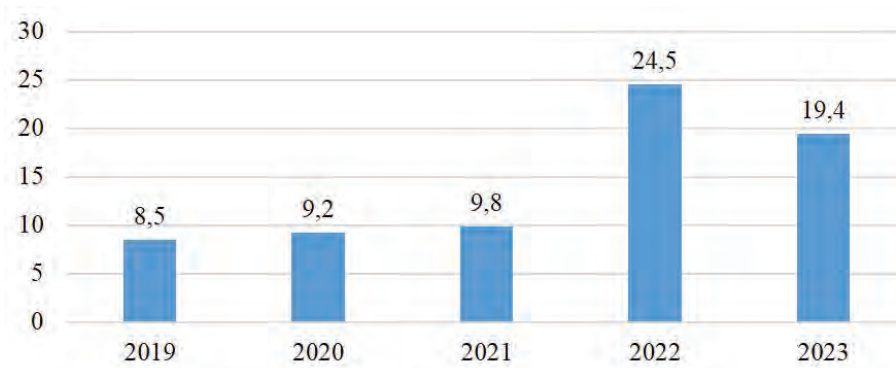


As we can see, both the annexation of Crimea and the occupation of parts of Donetsk and Luhansk regions and the current Russian invasion have had a significant negative impact on the level of GDP per capita. Ukraine's GDP fell by -29.1% in 2022 compared to the previous year. In 2022, the GDP amounted to \$160,503 million, and Ukraine ranks 59th in the GDP ranking of 196 countries. The absolute value of GDP in Ukraine fell by \$39,652 million compared to 2021. In 2022, Ukraine's GDP per capita amounted to \$3,915, which is \$967 less than in 2021, when it was \$4,882 (GDP in Ukraine falls 29.1. Country Economy, 2023). The decline in GDP per capita indicates a complex negative impact of the war on the economic situation of the state, primarily a decline in business activity, a decline in industrial production, low investment activity, and general instability. This negative trend leads to limited access to education, healthcare and other social services. In addition, the decline in this indicator leads to a reduction in consumer activity, as people may be limited in their purchasing power. In general, a decline in GDP per capita indicates problems in the economy and a decline in the quality of life of citizens. A general decline in the country's economic potential leads to an increase in unemployment.

According to the NBU's updated estimate, the unemployment rate in Ukraine was 21.1% in 2022. The government plans to reduce the unemployment rate in Ukraine to 19% in 2023 (Prasad, 2023). According to the IMF, the unemployment rate in Ukraine in 2022 was 24.5%, with a projected decline to 19.4% by the end of 2023 (Figura 2).

In general, the military conflict is a serious challenge for the economy and employment, and its impact on unemployment leads to an increase in the level of vulnerable groups.

Figura 2. Unemployment dynamics in Ukraine in 2019-2023 according to (Unemployment rate. IMF, 2023).



In addition, social institutions are being devastated. According to the KSE (Unemployment rate. IMF, 2023), as of January 2023, at least 4497 social, educational, and healthcare institutions suffered direct damage as a result of Russia’s full-scale invasion, which began on February 24, 2022. According to KSE Institute project experts, the total amount of direct losses for social, educational, and healthcare institutions is estimated at \$10.7 billion (Table 2).

Of this amount, \$0.2 billion is damage to the social sector, \$8.8 billion is damage to educational institutions, and \$1.8 billion is damage to healthcare institutions. The total indirect losses amounted to \$11.1 billion, and the amount needed to repair them is at least \$19.7 billion. The total number of damaged or destroyed educational facilities is over 3,127, including 1,489 schools, 885 kindergartens and 517 university buildings. Healthcare facilities were damaged or destroyed almost three times less - 1245 facilities. Among the medical facilities, outpatient clinics suffered the most - 430 facilities and 362 hospitals. Also, 154 social security institutions were damaged or destroyed. The most affected were sanatoriums - 46 institutions, social welfare centers - 43, and boarding schools - 31. Losses in the social sphere, medicine and education as a result of Russian aggression are estimated at \$10.8 billion. KSE, 2023). The regions where social protection institutions suffered the most are shown in Figura 3.

The social sphere suffered the most destruction in Donetsk region (21%), Odesa region (20%), and the city of Kyiv (18%).

Figura 4 shows the regional structure of the affected educational and healthcare institutions. The greatest damage was done to these institutions in Donetsk, Kharkiv and Luhansk regions due to the highest intensity of hostilities in these regions.

Figura 3. Regional structure of affected social institutions

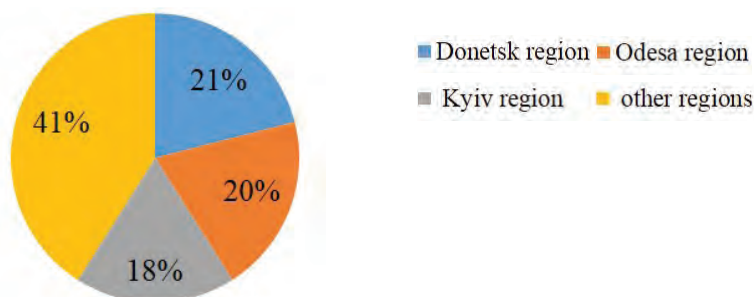
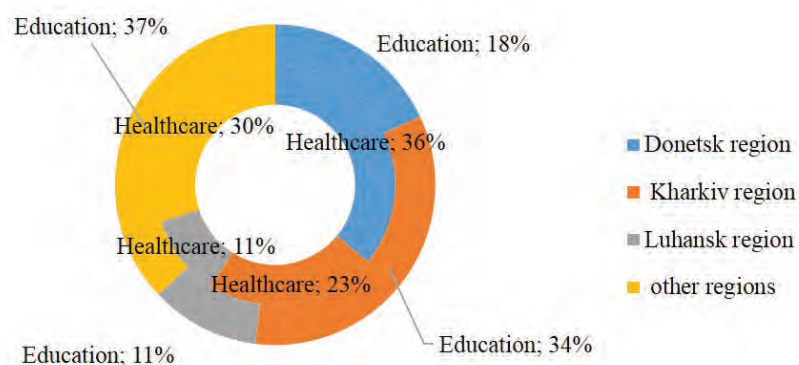


TABLE 2. KSE Institute's estimate of losses to the social sphere, social, education, and healthcare institutions as of January 1, 2023.

Sphere	Name of the institutions	Amount of losses, mln USD
Social sphere	Sanatoriums	79,5
	Boarding schools	55,1
	Social centers	25
	Children's camps	15,6
	Institutions for the elderly	9,4
	Children's homes	3,3
	Institutions for the homeless	0,1
	Total	188
Healthcare	Hospitals	1430
	Other institutions	169,6
	Outpatient facilities	96,9
	Polyclinics	75,5
	Blood centers	17,6
	Total	1789,6
Educational sphere	Higher education institutions	3795,5
	Secondary education institutions	3298,2
	Institutions of preschool education	1043,8
	Vocational education institutions	413,7
	Out-of-school education institutions	86,4
	Vocational education institutions	39,2
	Total	8676,8
Other institutions		108,2
	Together	10762,6

Unemployment rate. IMF; 2023.

Figura 4. Regional structure of affected educational and healthcare institutions

In addition to the direct damage to the destroyed social infrastructure, social security costs have increased significantly, driven by a significant increase in unemployment and the number of unemployed internally displaced persons, which leads to social tensions. As of mid-2022, additional state budget expenditures to cover the need for social benefits, based on the number of internally displaced persons and other categories of citizens (excluding unemployment costs) who additionally need social support, are estimated at USD 6.4 billion. In its June report, the World Bank estimated the needs for reconstruction of the social, healthcare and education sectors at \$44.9 billion. It is expected that the estimate of these reconstruction needs is not final, as the situation in the social sphere will directly depend on further escalation of hostilities and other factors related to the hostilities - an increase in the number of vulnerable groups due to the growing number of war veterans, internally displaced persons, persons who have lost their breadwinners, become disabled, etc. (Losses in the social sphere, medicine and education as a result of Russian aggression are estimated at \$10.8 billion. KSE, 2023).

Currently, the social sphere of Ukraine is undergoing significant transformational changes. The martial law in relation to the social sphere in Ukraine leads to deep and complex transformations of a comprehensive nature and creates a number of challenges:

- direct damage from hostilities causes the destruction of social infrastructure, such as schools, hospitals, and other institutions;
- destruction of social institutions leads to limited access to education, healthcare and other social services for the population;
- damage to the educational sector necessitates large-scale reconstruction of schools, higher education institutions and kindergartens;
- loss of access to education for thousands of children and youth may have far-reaching consequences for the further development of society;
- the destruction of health care facilities leads to insufficient medical care and treatment for the victims;
- there is an increase in the need for psychological and psychiatric care due to the stressful conditions of a prolonged war;
- unemployment is increasing due to the destruction of economic infrastructure and businesses and the need to support them;
- changes in the demographic situation due to human casualties, internal displacement of the population and migration of women and children abroad, deportation of children from the occupied regions to the Russian Federation;
- increased need for social support for internally displaced persons, families who have lost a breadwinner, war veterans and other vulnerable groups;
- increased social expenditures and reconstruction efforts put great financial pressure on the state budget in the context of its total deficit and subsidization by international organizations;
- increased number of vulnerable groups, such as children, the elderly and the disabled;
- lack of or limited access to social services due to the destruction and suspension of social institutions, and the significant occupation of the territory;
- risk of epidemics due to limited access to sanitation and medical resources.

All of these challenges put enormous pressure on the social sector and require comprehensive and long-term measures to restore and support the population in the context of armed conflict.

In general, martial law significantly worsens the state of the social sphere, causing the need for a wide range of measures to restore and ensure the social well-being of the population. Subsequently, the social policy response includes not only the restoration of physical structures, but also the development of social programs and psychological support aimed at restoring a favorable environment for people in difficult martial law conditions.

Despite the difficulties and challenges associated with martial law, there are certain opportunities for the development of Ukraine's social sector both during and after the end of the war. First and foremost, it is the restoration of infrastructure through the implementation of targeted programs and funding to rebuild destroyed facilities such as schools, hospitals and social centers and the development and implementation of initiatives to create new and modernize existing social institutions. In the area of education, developing initiatives to ensure access to education for all segments of the population, including internally displaced persons and children affected by the war, with the assistance of international organizations, will strengthen and reform the education system, with a focus on supporting vocational training and retraining programs for people who have lost their jobs due to the war. There are great opportunities for Ukraine in terms of medical rehabilitation and psychological support. Ukraine can become a global center for launching psychological services, developing and testing effective support systems for those who have faced stress and trauma as a result of military events. Ukraine will need to develop social services for vulnerable groups to increase the availability of social services for children, the elderly, the disabled, and others in need, and can receive humanitarian support for these programs from international organizations or invite them to conduct special missions in Ukraine after the war ends. In addition, the end of the war will create a favorable environment for the development of innovations in the social sphere to attract financial support for social startups and projects aimed at improving living conditions after the war.

Active involvement of citizens and volunteers in social development projects at the current stage will further strengthen the cohesion of Ukrainian society and aim it at solving pressing social problems by creating platforms and initiatives that promote community interaction and support. These opportunities involve cooperation between the government, civil society, international organizations and volunteer groups to achieve successful and sustainable results in the development of the social sphere in the context of post-war recovery.

CONCLUSIONS

Ukraine is facing significant social challenges as a result of the Russian aggression - a large number of dead, wounded and internally displaced persons, destroyed infrastructure, loss of housing and large-scale migration flows, destruction of cities, schools and social institutions - which leads to severe trauma and stress for the population. The significant number of refugees from Ukraine, which reaches millions, poses extraordinary challenges for host countries. The financial assistance received from international donors helps to save lives and provide the necessary assistance, but there is a risk of donor fatigue, which can lead to difficulties in the future. One of the key problems is the high unemployment rate caused by economic instability and the suspension of business operations due to the hostilities. Martial law slows down the economy, leading to higher unemployment and lower living standards. In general, the military events in Ukraine are causing a number of complex

problems, ranging from traumatic impact on the population to significant challenges in the area of socio-economic recovery and humanitarian assistance. The decline in economic potential as a result of the war leads to limited access to education, healthcare and other social services. It also leads to a reduction in consumer activity, which is reflected in a deterioration in the quality of life. In addition to direct losses, the war has also led to an increase in social welfare spending due to rising unemployment and other social challenges. This puts a lot of pressure on the state budget and society, requiring rapid and effective recovery and social support strategies for the affected industries and population, and generates the need for a wide range of measures to restore and support the population, including infrastructure reconstruction, social programs, psychological assistance, and effective social policies.

Despite the difficulties of martial law in Ukraine, there are opportunities for the development of the social sector both during and after the end of the war. Key opportunities include rebuilding infrastructure, reforming the education system, and developing medical rehabilitation and psychological support. Ukraine could become a center for psychological services and humanitarian support, as well as the development of social services for vulnerable groups. The development of social innovations and the involvement of citizens and volunteers will contribute to the sustainable development of the social sphere in the post-war recovery.

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ARTÍCULO DE INVESTIGACIÓN

Actitudes de los atletas con discapacidad auditiva hacia los derechos humanos en el deporte

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Resumen. El objetivo de este estudio es examinar las actitudes de los atletas con discapacidad auditiva hacia los derechos humanos en el deporte. En el estudio participaron voluntariamente 119 atletas con discapacidad auditiva seleccionados mediante un método de muestreo aleatorio simple en diferentes provincias de Turquía. Para la recopilación de datos, se utilizó la “Escala de Actitudes hacia los Derechos Humanos en el Deporte” (HRASS) desarrollada por Sadık (2014), que consta de 3 subdimensiones y 29 ítems. Las diferencias entre los grupos se analizaron con las pruebas “Mann-Whitney U” y “Análisis de Varianza Unidireccional de Kruskal-Wallis (K-W ANOVA)”, y se determinó de qué grupos provenían las diferencias mediante la prueba “Dunn Bonferroni”. Los puntajes totales de HRASS y sus subdimensiones no muestran diferencias estadísticamente significativas según el género y el grado de discapacidad auditiva. Según la variable de edad, se encontraron diferencias en las subdimensiones de “derechos personales”, “derechos sociales” y en los puntajes totales de HRASS; según el nivel de ingresos, se encontraron diferencias en las subdimensiones de “derechos personales”, “derechos de solidaridad” y en los puntajes totales de HRASS; según el nivel educativo, se encontraron diferencias en las subdimensiones de “derechos personales”, “derechos sociales” y “derechos de solidaridad” en función del estado de discapacidad. En la revisión de la literatura, no se encontró ningún estudio sobre las actitudes de los atletas con discapacidad auditiva y otras discapacidades hacia los derechos humanos en el deporte. Por lo tanto, el objetivo del estudio es examinar dichas actitudes. Dentro de este marco, el principal propósito de la investigación es determinar las actitudes de los atletas con discapacidad auditiva hacia los derechos humanos en el deporte. Se considera que los resultados de la investigación servirán de base para futuras actividades e investigaciones destinadas a llenar esta laguna. En consecuencia, se puede realizar una evaluación de la relación entre el deporte y los derechos humanos de los atletas con discapacidad auditiva. Nuestro estudio puede orientar los trabajos que se realicen en el futuro.

Palabras clave: discapacidad auditiva, atleta, derechos humanos en el deporte, actitud.

Attitudes of hearing-impaired athletes towards human rights in sports

Abstract. The aim of this study is to examine the attitudes of hearing-impaired athletes towards human rights in sports. 119 hearing-impaired athletes selected by simple random method in different provinces in Turkey participated in the study voluntarily. In order to collect the data, the ‘Human Rights Attitude Scale in Sports’ developed by Sadık (2014), which consists of 3 sub-dimensions and 29 items, was used. The differences between the groups were tested with the “Mann-Whitney U test” and “Kruskal-Wallis one-way analysis of variance (K-W ANOVA)” tests, and which groups the differences occurred from were tested with the “Dunn Bonferroni” test. The total scores of HRASS and its sub-dimensions do not show a statistically significant difference according to their gender and degree of hearing. According to the age variable, differences were found in the sub-dimensions of “personal rights”, “social rights” and HRASS total scores; according to the income level variable, differences were found in the sub-dimensions of “personal rights”, “solidarity rights” and HRASS total scores; according to the education level variable, differences were found in the sub-dimensions of “personal rights”, “social rights” and “solidarity rights” according to disability status. In the literature review, no study was found on the attitudes of hearing-impaired and other disabled athletes towards human rights in sports. Therefore, the aim of the study is to examine the attitudes of hearing-impaired athletes towards human rights in sports. Within the framework of these explanations, the main objective of the study was to determine the attitudes of hearing-impaired athletes towards human rights in sports. It is thought that the results of the research will shed light on the activities and researches to be carried out to fill this gap. Therefore, an evaluation of the relationship between sports and human rights of hearing-impaired athletes can be made. Our study can guide the work to be done later.

Keywords: hearing impaired, athlete, human rights in sports, attitude.

INTRODUCTION

It is accepted that the concept of human rights is part of natural law (Turan et al.). Human rights are rights that a person cannot give up or transfer without seeking any other quality as he is only human (Aslan, 2023). One consequence of distinguishing human rights from other rights and attributing their source to human nature is their universality (Bouchet-Saulnier, 2002). The concept of human rights is only in the form of rights arising from being Human (Crowd, 2017). All people have all fundamental rights, regardless of religion, language, race and gender. Human rights are the fundamental rights and freedoms that people have just because they are human (Çavuşoğlu et al., 2020). The freedom of man in society should be neither under the sovereignty of any will nor under the restriction of any law under any legislative power other than that established by consent in the state (Locke, 1823). Authenticity is considered as having an in-depth awareness of the thoughts and behaviors of the individual (Avolio and Gardner, 2005). According to Kernis and Goldman (2006), authenticity is the ability of the individual to continue his/her daily life according to his/her reality or self without any hindrance.

Today, the recognition of human rights and fundamental freedoms has not only been a focus of universal attention, but many international organizations have been established and various conventions

have been made through these organizations in order to protect them from contradictory trends and to realize them at a more advanced level. One of these organizations is the United Nations organization, which covers almost all countries of the world (Turan et al. 2018; Sadık, 2014). The United Nations Declaration includes fundamental rights and freedoms such as social security, work, health, education. These rights should be fulfilled within the framework of the understanding of the social state. Thus, in the social state, everyone has the right to live in a healthy and balanced environment, everyone has the right to live their lives in mental and physical health, the right to live in houses suitable for health conditions, and the right to get rid of fears of future and poverty (Turan et al. 2018; Sadık, 2014; Göze, 2005). Although it is not directly included in the Universal Declaration of Human Rights, another right is the right to sports. Due to the place it has acquired in society, its effects on the mental, physical and spiritual competence of individuals, and its contributions to world peace and brotherhood, sport can also be considered as basic human rights (Sadık, 2014). Sport is defined as an effective tool that determines the lifestyles of individuals and enables societies to interact with each other (Yiğit and Dalbudak, 2022).

It is stated that sports is becoming more widespread in today's world every passing day and has become the focus and focus of individuals working across many disciplines, that it has come to the forefront economically, that it is important on the international platform, that the media attaches importance to it in many ways and that it is a social phenomenon that is an indispensable part of individuals' daily lives. (Pepe and Arısoy, 2023; Koçyiğit, 2022; Abis, 2022; Aytaç et al. 2022; Koçyiğit et al. 2022; Dalbudak and Balyan, 2021; Akıncı et al. 2020; Dalbudak and Yiğit, 2019). Sport is extremely important for individuals with disabilities. Disability describes a person who has difficulties in adapting to social life and meeting daily needs due to the loss of physical, mental, spiritual, sensory and social abilities to varying degrees, either from birth or for any reason later in life, and who needs protection, care, rehabilitation, counseling and support services. Disabled people are examined in 4 groups: visually impaired, hearing impaired, physically impaired and mentally impaired (Dalbudak, 2022; Dalbudak, 2019). Hearing impairment is the situation in which the educational performance and social adaptation of the individual are adversely affected due to the difficulty in acquiring speech, using language and communication due to the partial or complete inadequacy of hearing sensitivity. In order for hearing to occur, it is necessary to have a sound, to have this sound within the limits of frequency and intensity to be perceived by the human ear, to have a receptive organ that can perceive the sound, that is, the ear, to reach the hearing center in the brain by passing through the structures in the ear without obstruction, and to be perceived and interpreted correctly in this center (Belgin, 1995).

However, in the literature review, no study was found on the attitudes of hearing-impaired and other disabled athletes towards human rights in sports. Therefore, the aim of the study is to examine the attitudes of hearing-impaired athletes towards human rights in sports. Within the framework of these explanations, the main objective of the study was to determine the attitudes of hearing-impaired athletes towards human rights in sports. It is thought that the results of the research will shed light on the activities and researches to be carried out to fill this gap. Thus, an evaluation of the relationship between sports and human rights of hearing-impaired athletes can be made. Our study can guide the studies on what will be done later.

METHODOLOGY

Study Group

119 hearing-impaired athletes selected by simple random method in different provinces in Turkey participated in the study voluntarily. An online questionnaire was applied through the Google form.

Data collection

Data collection tools used in the research; personal information form and human rights attitude scale in sports (HRASS) were applied.

Personal information form

The personal information form consisted of 6 questions including the age, gender, income level, education level, disability status and hearing degree of the participants.

TABLE 1. Distribution of Demographic Characteristics of Participants.

Variable	Frequency (n)	Percentage (%)
Age		
15 - 20	56	47.1
21 - 25	36	30.2
26 and over	27	22.7
Total	119	100.0
Gender		
Female	41	34.5
Male	78	65.5
Total	119	100.0
Income Level		
Average level	107	89.9
High Level	12	10.1
Total	119	100.0
Education level		
Primary Education	9	7.6
High school	58	48.7
Associate degree	48	40.3
Bachelor's degree	4	3.4
Total	119	100.0
Disability Situation		
Congenital	83	69.7
Postnatal	36	30.3
Total	119	100.0
Degree of hearing		
Mildly hearing impaired	24	20.2
Moderately hearing impaired	74	62.2
Severely hearing impaired	21	17.6
Total	119	100.0

Out of 119 people in the sample group

- 56 (47.1%) were in the 15-20 age group, 36 (30.2%) were in the 21-25 age group, and 27 (22.7%) were in the 26 years and over group.
- 41 (34.5%) were women and 78 (65.5%) were men.
- 107 (89.9%) have middle income and 12 (10.1%) have high income.
- 9 (7.6%) have primary degree, 58 (48.7%) have high school degree, 48 (40.3%) have associate degree and 4 (3.4%) have bachelor's degree.
- 83 (69.7%) have congenital disability and 36 (30.3%) have postnatal disability.
- 24 (20.2%) are mildly hearing impaired, 74 (62.2%) are moderately hearing impaired, and 21 (17.6%) are severely hearing impaired.

Human Rights Attitude Scale in Sports (HRASS)

The 'Human Rights Attitude Scale in Sports' developed by Sadık (2014) was used. There are 29 questions that can be scored between 1 and 5 from each question in the scale. 1: Strongly Disagree, 2: Disagree, 3: Neutral, 4: Agree and 5: Strongly Agree were scored. A total score of 29 to 145 can be obtained from the scale. The scale does not include any reverse-scored item.

HRASS consists of 3 sub-dimensions:

- 1) Sub-dimension of personal rights (Item 1-2-3-4-5-6-7-8-9-10-11-12). A score between 12 and 60 can be obtained from the sub-dimension.
- 2) Sub-dimension of social rights (Item 13-14-15-16-17-18-19-20-21). A score between 9 and 45 can be obtained from the sub-dimension.
- 3) Sub-dimension of solidarity rights (Item 22-23-24-25-26-27-28-29). A score between 8 and 40 can be obtained from the sub-dimension (Sadık, 2014).

RELIABILITY OF HRASS AND ITS SUB-DIMENSIONS

The answers given to the scale by the sample group of 119 people who applied the "HRASS" have a direct effect on the scale reliability. Superficial or inconsistent answers reduce the reliability of the questionnaire. Cronbach's Alpha (α) internal consistency coefficient value is used to measure scale reliability. As the Cronbach's Alpha (α) value increases, the reliability of the questionnaire increases. The fact that the reliability coefficient in a scale is close to 1 may indicate that the scale is a very reliable measurement tool (Tavşancıl, 2002). The reliability of the measurement tools prepared for use in intergroup comparisons can be between 0.60 and 0.80. The reliability of the measurement tools in making decisions about individuals is expected to be above 0.80 and 0.90 if the decision can lead to very serious consequences (Özçelik, 1989).

According to the table, Cronbach's Alpha value for HRASS applied to sample group is $\alpha=0.952$, Cronbach's Alpha value for the sub-dimension of personality rights is $\alpha= 0.914$, Cronbach's Alpha value for the sub-dimension of social rights is $\alpha= 0.924$, and Cronbach's Alpha value for the sub-dimension of solidarity rights is $\alpha=0.829$. HRASS and all sub-dimensions are in the category of very reliable.

TABLE 2. Cronbach's Alpha Values of "HRASS" and "Its Sub-Dimensions".

Scale and Subscales	Cronbach's Alpha
HRASS	0.952
Personal rights	0.914
Social rights	0.924
Solidarity rights	0.829

DATA ANALYSIS**TABLE 3.** Summary Statistics on HRASS and Sub-Dimension Total Scores

HRASS and its sub-dimensions	Minimum	Maximum	Mean	Standard Deviation
HRASS	37	145	69.06	27.34
Personal rights	12	60	26.82	12.65
Social rights	9	45	22.81	10.20
Solidarity rights	10	40	19.42	7.66

- The total mean score of the HRASS is 69.06 and its standard deviation is 27.34. The lowest total score is 37 and the highest total score is 145.
- The total mean score of the personality rights sub-dimension is 26.82 and the standard deviation is 12.65. The lowest score that can be obtained from the scale is 12, and the highest score is 60.
- The total mean score of the social rights sub-dimension is 22.81 and the standard deviation is 10.20. The lowest total score is 9 and the highest total score is 45.
- The total mean score of the solidarity rights sub-dimension is 19.42 and the standard deviation is 7.66. The lowest total score is 10 and the highest total score is 40.

Interpretation of the relationship between "HRASS" and sub-dimension total scores with pearson correlation coefficient

the relationship between the mean scores of the scale and the sub-dimensions was measured with the help of Spearman's ranking correlation coefficient, since the "HRASS" and sub-dimension total scores did not meet the normal distribution assumption. The correlation coefficient takes values ranging from -1 to +1. A positive value indicates a same-directional relationship between two variables, and a negative value indicates an inverse relationship between two variables. As the correlation value approaches -1 and +1, the severity of the relationship between them increases. A correlation coefficient of 0 indicates that there is no relationship between the two variables. As it gets closer to 0, the severity of the relationship decreases. Spearman's ranking correlation coefficient values between all sub-dimensions and the overall scale are given in the table below. The value in the cell indicates Spearman's correlation coefficient, and the value in parentheses indicates the p-value of whether the relationship is significant. If the p-value is less

than 0.05, there is a statistically significant relationship at the 95% confidence level and if it is less than 0.01, there is a statistically significant relationship at the 99% confidence level. The fact that the correlation coefficient between the two variables is not statistically significant indicates that the two variables are independent of each other.

TABLE 4. Interpretation of the relationship between “HRASS” and sub-dimension total scores with pearson correlation coefficient

	HRASS	Personal rights	Social rights	Solidarity rights
HRASS	1.000	0.922** (0.000)	0.681** (0.000)	0.768** (0.000)
Personal rights		1.000	0.473** (0.000)	0.569** (0.000)
Social rights			1.000	0.470** (0.000)
Solidarity rights				1.000

** Correlation is significant at the level of 0.01.

- When the table is examined, there is a statistically significant positive and strong relationship at the 99% confidence level between the “HRASS” total scores and all sub-dimension total scores.
- In addition, there is a statistically significant positive and strong relationship between the HRASS sub-dimension total scores at the 99% confidence level.

RESULTS

In the tables below, summary statistics of the scale score means depending on demographic characteristics are given. In addition, since the scale and subscale mean scores did not meet the normal distribution assumption, the differences between the groups were tested with the “Mann-Whitney U test” and “Kruskal-Wallis one-way analysis of variance (K-W ANOVA)” tests, and which groups the differences occurred from were tested with the “Dunn Bonferroni” test. Analyses were conducted at 95% confidence level.

- Individuals’ “personality rights”, “social rights” sub-dimensions and “HRASS” total scores increase as the age group increases ($p < 0.05$). In addition, the “solidarity rights” sub-dimension total scores of individuals do not show a statistically significant difference according to age groups ($p > 0.05$).
- The total scores of the individuals regarding the “HRASS” and its sub-dimensions do not show a statistically significant difference according to their gender ($p > 0.05$).
- The “personality rights”, “solidarity rights” sub-dimensions and “HRASS” total scores of high-income individuals are higher than the total scores of middle-income individuals ($p < 0.05$). In addition, the “social rights” sub-dimension total scores of the individuals do not show a statistically significant difference according to their income level ($p > 0.05$).

TABLE 5. Analysis of “HRASS” and sub-dimension total scores according to demographic characteristics of individuals.

		Personal rights	Social rights	Solidarity rights	HRASS
Age					
15 - 20	Mean	22.71	19.85	17.37	59.94
	St. Deviation	9.07	8.67	5.06	18.06
21 - 25	Mean	28.55	22.94	20.52	72.02
	St. Deviation	11.09	8.52	6.88	24.68
26 and Over	Mean	33.03	28.77	22.22	84.03
	St. Deviation	17.48	12.63	11.38	38.20
	p-value	0.008*	0.006*	0.099	0.006*
Gender					
Female	Mean	28.80	24.46	20.09	73.36
	St. Deviation	15.74	12.30	9.89	35.04
Male	Mean	25.78	21.94	19.07	66.80
	St. Deviation	10.64	8.86	6.22	22.20
	p-value	0.740	0.592	0.432	0.861
Income Level					
Moderate level	Mean	26.01	23.13	19.14	68.28
	St. Deviation	13.10	10.71	8.03	28.74
High Level	Mean	34.00	20.00	22.00	76.00
	St. Deviation	0.00	0.00	0.00	0.00
	p-value	0.000*	0.220	0.000*	0.000*
Education level					
Primary Education	Mean	18.11	16.22	15.44	49.77
	St. Deviation	7.70	9.64	2.87	14.71
High school	Mean	26.74	23.75	19.87	70.37
	St. Deviation	12.05	9.48	7.29	25.69
Associate degree	Mean	28.77	22.66	19.77	71.20
	St. Deviation	13.93	11.06	8.74	30.99
Bachelor's degree	Mean	24.25	25.75	17.75	67.75
	St. Deviation	6.39	7.67	4.64	3.59
	p-value	0.081	0.062	0.156	0.046*
Disability Stuation					
Congenital	Mean	26.45	24.46	20.91	71.84
	St. Deviation	15.07	11.46	8.15	31.63
Postnatal	Mean	27.66	19.00	16.00	62.66
	St. Deviation	2.52	4.61	4.96	10.80

TABLE 5. CONTINUATION

		Personal rights	Social rights	Solidarity rights	HRASS
p-value		0.028*	0.016*	0.004*	0.916
Degree of hearing					
Mildly hearing impaired	Mean	32.04	25.54	23.45	81.04
	St. Deviation	17.66	13.01	10.38	39.73
Moderately hearing impaired	Mean	25.32	21.62	18.28	65.22
	St. Deviation	10.15	8.89	6.06	20.87
Severely hearing impaired	Mean	26.14	23.90	18.85	68.90
	St. Deviation	12.95	10.72	7.97	27.93
p-value		0.633	0.448	0.100	0.490

- The total scores of the “personality rights”, “social rights” and “solidarity rights” sub-dimensions of the individuals do not show a statistically significant difference according to their education levels ($p > 0.05$). In addition, the overall scale total scores of primary school graduates are lower than the total scores of high school, associate degree and bachelor’s degree graduates ($p < 0.05$).
- The “personality rights” sub-dimension total scores of individuals with postnatal disabilities are higher than the total scores of individuals with congenital disabilities ($p < 0.05$). The total scores of the “social rights” and “solidarity rights” sub-dimensions of individuals with congenital disabilities are higher than the total scores of individuals with postnatal disabilities ($p < 0.05$). In addition, the overall scale total scores of the individuals did not show a statistically significant difference according to their disability situations ($p > 0.05$).
- The total scores of the individuals regarding the “HRASS” and its sub-dimensions do not show a statistically significant difference according to their hearing degrees ($p > 0.05$).

DISCUSSION

In this section, the findings obtained as a result of the analysis of the data in the research are discussed and interpreted.

Individuals’ “personality rights”, “social rights” sub-dimensions and “HRASS” total scores increase as the age group increases ($p < 0.05$). This can be explained by the experience gained in life as the age group of hearing-impaired athletes increases. As individuals get older, they look at the society they live in from a different perspective thanks to the experiences they have gained in their lives. Individuals approach events from a different perspective as a result of their age. We can mention that as individuals get older, the mind comes to the fore, not emotions. In addition, the “solidarity rights” sub-dimension total scores of individuals do not show a statistically significant difference according to age groups ($p > 0.05$). In the study conducted by Turan *et al.* (2018), when the human rights attitudes of football players were examined according to the age variable, they reported that there were significant differences in terms of social rights depending on the

increase in age, while no significant difference was found in the personality and solidarity rights sub-dimensions. We can say that every person in society, regardless of age, is in solidarity. Without solidarity, individuals cannot act and produce alone. We can say that societies are societies as a result of unity and solidarity. When the literature is reviewed, there is no study on the subject. In this case, no findings were found to support our study.

The total scores of the individuals regarding the “HRASS” and its sub-dimensions do not show a statistically significant difference according to their gender ($p>0.05$). As a result of our study, it is seen that there is no difference in the human rights attitudes of individuals whether disabled athletes are female or male. It is noticed that human rights attitudes are important for female and male athletes. The fact that there is no difference between the genders is the result of the gains in the human rights attitudes of individuals. In other words, it is seen that human rights are important for all people. When the literature is reviewed, there is no study on the subject. In this case, no findings were found to support our study.

The “personality rights”, “solidarity rights” sub-dimensions and “HRASS” total scores of high-income individuals are higher than the total scores of moderate-income individuals ($p<0.05$). It is seen that economic income has an impact on human rights. As the economic income level of individuals increases, they can devote time to other areas. Outside of this time, individuals can research laws related to human rights. They have information on this subject. As the income level increases, the angle of view towards the human world changes. They know their rights and laws with the individual. Individuals with low economic levels turn to this area to improve their economies. They do not turn to other jobs. Societies with backward economic levels do not know their rights and laws. As the income level of individuals increases, it is normal for their economic levels to be good and for individuals’ human rights attitudes to increase. In addition, the “social rights” sub-dimension total scores of the individuals do not show a statistically significant difference according to their income level ($p>0.05$). Regardless of the income level of individuals, they know their social rights in society. If individuals know their social rights, they benefit so much from the environment they live in. When the literature is reviewed, there is no study on the subject. In this case, no findings were found to support our study.

The total scores of the “personality rights”, “social rights” and “solidarity rights” sub-dimensions of the individuals do not show a statistically significant difference according to their education levels ($p>0.05$). Although their education levels are different, we can mention that the reason why there is no significant difference between them is that individuals are in constant communication with each other because they are disabled individuals and they inform each other about every issue. In addition, the overall scale total scores of primary school graduates are lower than the total scores of high school, associate degree and bachelor’s degree graduates ($p<0.05$). As the education level of individuals increases, there is an increase in the human rights attitudes of individuals with disabilities as a result of awareness or gains. As the level of education increases, people change a different perspective on life. They know how to get the information they want. As a result of the research on human rights, they are informed. Turan *et al.* (2018) found that the human rights attitude and originality levels of football players in sports differ according to their educational status. This study supports our study.

The “personality rights” sub-dimension total scores of individuals with postnatal disabilities are higher than the total scores of individuals with congenital disabilities ($p<0.05$). We can mention that the postnatal hearing-impaired individual has more knowledge about personal rights

than the congenital hearing impaired individuals as not being attached to any person before being disabled and having a high level of education. Individuals with disabilities may not have knowledge about every subject, such as individuals without disabilities. Being disabled is isolating oneself from society. They cannot know their rights. However, thanks to sports, they can learn all kinds of rights because there is team unity. All disabled individuals, whether in Turkey or abroad, inform each other. The total scores of the “social rights” and “solidarity rights” sub-dimensions of individuals with congenital disabilities are higher than the total scores of individuals with postnatal disabilities ($p < 0.05$). The reason why individuals with congenital disabilities are higher than individuals with postnatal disabilities is that they are aware of each other. They inform each other. Sports is a place of unity and solidarity for individuals with disabilities. They provide all kinds of communication here. They defend the rights of one and the other. Sports clubs are a family environment for the disabled. They hold on to life in sports clubs. All kinds of information exchange are here. In addition, the overall scale total scores of the individuals did not show a statistically significant difference according to their disability situations ($p > 0.05$). It is normal to observe an increase in the human rights attitudes of individuals with disabilities due to the training and achievements received in sports clubs. Therefore, there is no difference according to disability. When the literature is reviewed, there is no study on the subject. In this case, no findings were found to support our study.

The total scores of the individuals regarding the “HRASS” and its sub-dimensions do not show a statistically significant difference according to their hearing degrees ($p > 0.05$). As a result of our study, we can say that human rights in sports are the same regardless of the degree of hearing. We can say that human rights are effective on all individuals with disabilities regardless of their hearing degree. We can mention that human rights are very important for the disabled individual. If people know about human rights, we can say that they will defend their own rights. When the literature is reviewed, there is no study on the subject. In this case, no findings were found to support our study.

CONCLUSION

As a result of the study, the total scores of HRASS and its sub-dimensions do not show a statistically significant difference according to their gender and degree of hearing. According to the age variable, differences were found in the sub-dimensions of “personal rights”, “social rights” and HRASS total scores; according to the income level variable, differences were found in the sub-dimensions of “personal rights”, “solidarity rights” and HRASS total scores; according to the education level variable, differences were found in the sub-dimensions of “personal rights”, “social rights” and “solidarity rights” according to disability status. In the literature review, no study was found on the attitudes of hearing-impaired and other disabled athletes towards human rights in sports. Therefore, the aim of the study is to examine the attitudes of hearing-impaired athletes towards human rights in sports. Within the framework of these explanations, the main objective of the study was to determine the attitudes of hearing-impaired athletes towards human rights in sports. It is thought that the results of the research will shed light on the activities and researches to be carried out to fill this gap. Therefore, an evaluation of the relationship between sports and human rights of hearing-impaired athletes can be made. Our study can guide the work to be done later.

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El acento ucraniano de la crisis migratoria europea en el contexto de la filosofía de la marginalidad

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Resumen. El objetivo del estudio es comprender los procesos migratorios y su impacto en la marginación, así como explorar las perspectivas de desarrollo, utilizando como ejemplo a los inmigrantes ucranianos en Europa. Este estudio empleó una revisión semi-sistemática de la literatura para seleccionar fuentes de manera flexible pero dirigida, integrando perspectivas de diversas disciplinas sobre migración y marginalidad. Esta metodología permitió combinar estudios teóricos y empíricos de forma coherente sin restringirse a un marco estricto. Se concluye que se producirán más avances a nivel social y probablemente supondrán una distinción entre inmigrantes temporales e inmigrantes potenciales. Además de las medidas benéficas y socio-jurídicas aplicables a todos los inmigrantes, también se pueden esperar iniciativas orientadas a la asimilación de carácter sociocultural, socio-psicológico y socio-político.

Palabras clave: marginalidad, marginación, migración forzada, migrantes, la crisis migratoria europea, Ucrania.

The ukrainian accent of the european migration crisis in the context of the philosophy of marginality

Abstract. The aim of the study is to understand migration processes and their impact on marginalization, as well as to explore development prospects, using Ukrainian immigrants in Europe as an example. This study employed a semi-systematic review of the literature to select sources in a flexible but targeted manner, integrating perspectives from various disciplines on migration and marginality. This methodology made it possible to combine theoretical and empirical studies in a coherent way without being restricted to a strict framework. It is concluded that there will be further progress at the societal level and will probably involve a distinction between temporary immigrants and potential immigrants. In addition to the charitable and socio-legal measures applicable to all immigrants, assimilation-oriented initiatives of a socio-cultural, socio-psychological and socio-political nature can also be expected.

Keywords: marginality, marginalization, forced migration, migrants, European migration crisis, Ukraine.

INTRODUCTION

As regards the level of research on marginalisation and migration, there is a serious lack of research on the subject. An analysis of studies published in the Web of Science Core Collection database by topic (from 1990 to 2023) found 169 results. In the early studies from 1990 to 2003, the most cited study (117 citations) is the one by Sam and Berry (1995), which examined the relationship between migration and emotional disturbances among young third world immigrants in Norway. Equally relevant is the article by Weisberger (1992), which reconstructs the concept of marginality formulated by Robert Park in his book *Migration and the Marginal Man* in order to develop a more sophisticated general theory of marginality. Wastl-Walter, Váradi and Veider (2003) focused on the strategies that people living in border areas use to cope with their marginality and the question of whether they should stay or leave. In terms of recent research, the article by Castillo et al. (2023) presents the development of strategies that favour the integration of migrant communities by meeting their needs and expectations for a better quality of life. Moralli (2023) explored the role of social innovation in combating exclusion and marginality related to migration management. While a variety of scholarly disciplines focus on migration and marginalisation, in this article we want to focus on a philosophical approach. According to Bortnykov et al. (2021) the New Age philosophy as a style of thinking demonstrates an increasingly noticeable aspiration to get as close as possible to mass consciousness. Daily life, real human life increasingly become the object of philosophical attention. It becomes more and more obvious that the object of philosophy is generated by shocks and difficulties in social life, the circumstances of which determine the development of one or another form of philosophy (Dewey, 1920). These shakes are primarily related to migration crises, growing ideological misunderstandings, political conflicts and military clashes between different nations and social groups (Vytkaľov et al., 2022: 27), which, sadly, have become the reality of modern Europe. One of the recent shocks that have most painfully affected Europe in general and every European's life is the war in Ukraine. In addition to many humanitarian, economic, political issues, the war

caused the increase in migration flows from Ukraine, raising the problems of forced migration and migrant marginalization. Answers to numerous questions require deep philosophical reflections.

Based on the UNHCR data (2023), in May 2023, 8,2 million war refugees from Ukraine were registered in Europe. Of them, only 5.1 million were registered for temporary protection or used national protection programmes in Europe. About half of those who fled to European countries were adult women; 40%, children; and 10%, men. However, despite the existing legal migration channels, according to the data of United Nations Office on Drugs and Crime (UNDC, 2022), trafficking in people from Ukraine, especially children, still occurs in Europe through illegal adoptions and illegal surrogacy. Some refugees from Ukraine are subjected to forced labour and sexual exploitation. Criminal groups involve Ukrainians in their networks, forcing them to beg and/or engage in criminal activities. Thus, we observe a clear threat of marginalisation of the European social space, which endangers both migrants and the European community (Grechka, 2022; Opióła et al., 2022) and, therefore, requires not only political and technological solutions but, first of all, a conceptual response to the challenges faced.

In general, the problem of forced displacement of people is not new; besides, it is considered one of the sorest problems the humanity has faced throughout its history (Suvorova, 2018: 176). Irrelevant is its philosophical problematicity too, which is rooted in Kant's project of perpetual peace on a global scale, where the insistence on maintaining an unfriendly attitude towards a foreigner is concretized by the right to pay a visit but not by the right to live permanently. The question of "the right to pay a visit", and even more so "the right of common possession of the earth", verbalised but not fully explained by Kant, was one of the most relevant issues of practical politics, ideology and law (Zenkin, 2004: 88) in the European intellectual space at the turn of the 19th century. Against the background of the increasing number of migrants, this problem moved to the epicentre of intellectual debate and social practice (Bud'ko, 2016: 56), which provided the basis at the height of the migration crisis in 2014 to problematise the issue of preserving Western culture as Christian identity: "Thousands of years ago, separating hospitality and charity, the Church declined only hospitality as a social stereotype that threatened its identity, but it did not decline hospitality as a way to exercise charity – for those who are really in need of charity, and not for those who claim to it violently and demand it. Which way does modern Europe do? Out of doubt, it gets to choose" (ibid. 65). Since then, having learned from past experiences in dealing with problems posed by migration, Europe has made great efforts to understand them and develop practical solutions. Today, however, due to the multi-million flows of forced migrants and refugees from Ukraine, these problems became particularly acute again and, therefore, require a new approach, considering the current reality. One of the problems that needs urgent attention, in our opinion, is the problem of marginalisation of the European socio-cultural space.

Thus, having defined the interdisciplinary status and the problem of different interpretations of the nature of marginality in philosophy and social sciences, we aim to understand migration processes as an impulse of marginality and the prospects of the development of the problem on the example of Ukrainian migrants to Europe.

METHODOLOGICAL APPROACH

This study used a semi-systematic literature review method to ensure a flexible yet targeted source selection process, which corresponded to research objectives and allowed to integrate insights of different disciplines on migration and marginality. This approach is particularly useful when ex-

amining complex social and humanities topics that require to combine various theoretical and empirical studies without limiting the analysis to a strict framework of the systematic literature review (Baumeister & Leary, 1997; Ferrari, 2015). It also provides an opportunity to observe the development of various studies and concepts (Snyder, 2019), which is particularly important for achieving the purpose of this study. Despite the fact that the narrative literature selection is looser than in the systematic review, according to Ferrari (2015), the literature search and selection can be structured according to certain guidelines. These are presented in Table 1.

Table 1. Literature search and selection process.

Stage	Activity	Detailing
1. Formulation of research questions	Defining the main research questions	How is marginality understood in philosophy and sociology? How is migration related to marginalization processes? How do different disciplines interpret marginality?
2. Search strategy	Selection of keywords and databases	<i>Keywords:</i> “marginality AND migration”, “forced migration AND social exclusion”, “marginalization theory AND identity”, “migration AND Ukraine” <i>Databases:</i> Web of Science; Scopus; JSTOR; EBSCO; Google Scholar.
3. Inclusion and rejection criteria	Establishing criteria for selection and rejection of articles	<i>Inclusion criteria:</i> - scientific articles on marginality in the context of migration; - philosophical, sociological, cultural studies research; - empirical and theoretical research; - studies on migration, related to the context of the war in Ukraine; - recent studies (after 2000), excluding classical works. <i>Rejection criteria:</i> - articles that are not related to migration; - very narrow empirical research without a theoretical context; - repetitive or overly general articles.
4. Assesment	Every selected study was further assessed for quality and relevance.	<i>Assessment criteria:</i> clarity (how marginality is defined); interdisciplinarity (several perspectives are analyzed); novelty (what new insights it provides); theoretical value (how theoretical models are examined; e.g., R. Park’s “marginal man”).
5. Analysis and synthesis	Grouping by topics	<i>Groups:</i> thematic (classified by topics); historical (the development of theories is examined); conceptual (main definitions of marginality are assessed).

Thus, application of this approach was aimed at making literature search both structured and flexible, avoiding the limitations of the systematic review but at the same time ensuring analytical consistency. Examination of any social phenomenon requires integration of different perspectives of

the humanities and social sciences, because the human being as a subject and object of research does not exist in a social vacuum. Therefore, different disciplines (e.g., philosophy, sociology, psychology, anthropology) inevitably intertwine, allowing us to avoid reductionism that can result from a narrow application of a discipline or method.

The humanities and social sciences have different epistemological boundaries, but their interaction allows us to better understand complex experiences of refugees. However, in this context, interdisciplinarity is not only about combining different disciplines, but it is also a critique of their boundaries (Das, 2022), allowing us to break free from the limitations of the conventional sociological or political analysis of migration and to examine multifaceted philosophical, social, and cultural issues. Therefore, by critically looking at the topic under consideration from the interdisciplinary perspective, cultural-anthropological, phenomenological and social-philosophical reflections have been employed to help reveal the phenomenon of marginality. The insights of R. Park, E. Stonequist, J. Derrida, M. Foucault, etc. have been used to understand the impact of migration on identity and social integration.

In the study, the key role falls on the philosophical analysis, which allows us to interpret migration as one of the impulses of marginalization. Specifically, the philosophical approach was applied to evaluate how migrants' experiences shape new social and cultural structures and to reveal the dynamism of marginality. An integrated comparative analysis was employed to assess different waves of migration and their impact on societies. The secondary data analysis, which was performed based on UNHCR and UNDC reports, provided relevant statistical data on the scale of Ukrainian migration and their protection mechanisms. Meanwhile, by examining documented experiences, the integrated phenomenological and hermeneutic analysis allowed to interpret cultural meanings and symbols as well as to evaluate the change in migrants' identity in the new environment.

RESULTS

The multiplicity of the phenomenon of marginality

Marginality is usually perceived as “a situation where an individual or a group is at margin in a certain social, economic or cultural characteristics due to some causal complexes and exclude such groups or individual from the rest of population” (Zahra et al., 2018: 203). Meanwhile, according to L. V. Shipovalova, “the concept of marginality includes two interpretations as a characteristic of existence: first outside the borderline and second on the borderline” (Shipovalova, 2018). However, the use of this concept raises some problems. The problematicity of the concept of marginality is specific due to a considerable list of factors, two of which should be distinguished.

First, we are talking about the relatively recent emergence of the concept “marginality” in social sciences, related to R. Park's (1928: 893) proposed concept “marginal man” while analysing the crisis experienced by migrants and highlighting “the moral turmoil” arising from new cultural contacts. Until then, only E. Durkheim's conception of “anomy” as a breakdown of social ties between people or between people and the society, resulting from intense change (Faizi, Nayebi, 2023; Pillay et al., 2023), was used. Anomy can be described as a predecessor of the “marginality” category in sociology and later, in philosophy and other areas of social cognition and the humanities. According to S. Pillay et al. (2023), the conception of anomy can explain the situation of migrants experiencing cultural changes, and both of these concepts can be used together because in the case of a violation of a person's inclusion in the social environment, the “anomic phenomenon of the person's marginalization” takes place (Hakobyan et al., 2022: 9).

Second, we should consider the multifaceted nature of the marginality phenomenon, and thus, its interdisciplinarity, inevitably leading to different interpretations of it. In addition, since the list of sources on the problem of marginality is quite extensive, naturally, it emerges in a rather mosaic way and its essence as well as general features are often lost in the descriptions of separate, partial processes or phenomena. This determines certain devaluation of the marginality problem in the eyes of scientists and “the marginal position of the phenomenon of marginality” (Zaitsev, 2002: 54), which it occupies on the border of various humanitarian disciplines. Despite this inconsistency of descriptions, researchers often emphasize the integrity of the phenomenon in terms of form and content, its universality and constancy, eternity and totality – it has been characteristic of the human world at all times of its existence (Zaitsev, 2002; Melnikova, 2007). Nevertheless, (and to a large extent because of this), the concept of marginality turns out to be convenient primarily for describing conflict situations caused by transformations, since it can stimulate and directly trigger transformation processes both in the sphere of the society and human consciousness. However, the multiplicity of the phenomenon causes problems in the use of the very concept of marginality, due to which this concept receives certain criticism. The main limitations of the concept are highlighted in the Table 2.

TABLE 2. Limitations of the concept of marginality and its use.

Emerging problems	Limits to the use of the concept	Source
The concept is valid only in a limited area and expresses a conflict with its ethnic group	It is only suitable for people who want to escape their ethnic group and to erase all traces of their racial and religious lineage. Such people may experience symptoms of mental stress and emotional insecurity.	Golovensky (1951: 339)
The concept is not appropriate in the context of a separate ethnic group	The conception of marginality cannot explain social and economic differentiation in ethnic minority groups.	Floyd (1998: 5)
The meaning varies depending on the discipline	In the literature of geography and social sciences, marginality is understood differently, there is a lack of clear consensus on the concept of marginality.	Cullen & Pretes (2000: 226)
The concept lacks scientific validity, different meanings of marginality are given in the literature	Marginality as a scientific concept cannot work if it has several levels of meaning. Finding oneself between different cultures, adaptation can be both successful and unsuccessful and can have negative or positive consequences. Thus, one concept cannot cover all the different variables.	Del Pilar & Udasco (2004: 11)
A concept cannot simultaneously distinguish and define specific and different phenomena	The wording of the concept of monocultural marginality is akin to the concept of social exclusion. It makes little sense to apply the same concept to different groups (e.g., those living in poverty, representatives of LGBT and academics).	Kharlamov, (2012: 629)
An unjustified distinction is made between marginal personality and marginal situation	Although early discussions on marginality emphasized stigmatized and subjugated identities, this concept was later replaced with inequality existing in objective social conditions (with hierarchy and barriers). However, the interaction between subjective and objective aspects of marginality is more significant.	Varghese & Kumar (2022: 36)

Thus, at least two aspects of limitations in applying the concept of marginality in the scientific literature can be distinguished. The first is that it is attempted to accommodate quite contradictory things in one concept, and the content of the concept may depend on the discipline in which it is used. This makes the concept of marginality too vague and imprecise. For example, war refugees from Ukraine are an ethnic minority in their host country. However, they are not a homogeneous ethnic group in terms of education, income, social integration, geographical location (economic and social regional differentiation) and other aspects. However, the same differences also exist in the host society; therefore, is ethnic origin a sufficient basis to talk about marginality? All the more so as the results of C. Husmann's (2016: 433) study do not allow to associate marginality with social exclusion due to ethnicity. According to J. M. Billson, "Marginality, which scholars have treated as a unitary concept, in fact encompasses at least three distinct types (cultural, social role, and structural). The effects of marginality on a person's identity and psycho-social well-being are not absolute, nor are the effects on cohesiveness and identity of groups and subcultures" (Billson, 2005: 42-43).

The second aspect is related to the first and emphasizes the person's uniqueness. More than half a century ago, Golovensky drew attention to the fact that even members of the same ethnic group reacted differently to the dominant culture. That is, having encountered another culture, lots of people do not feel the complex psychological consequences that cultural conflicts should cause. Reflection on different experiences has led him to the conclusion that "the marginal man concept, in its broadest sense, is a sociological fiction based upon a stereotype, which, like most stereotypes, is a caricature of a truth or an exaggeration and distortion of a fact" (Golovensky, 1952: 335). It is attempted to explain this by certain individual psychological approaches that make cultural integration successful or unsuccessful.

A study by Kunst and Sam (2013: 237-238) showed that migrants' global identification attitude towards culture was related to better socio-cultural adaptation, less stress and greater life satisfaction, since individuals' participation in alternative social and cultural spheres could compensate for the adaptation deficit.

American sociologist R. Park, who introduced the concept of marginality, first associated the nature of the marginal personality with the cultural conflict that can explain the process of civilization (Park, 1928: 881). Later, this concept was developed by E. Stonequist as a characteristic of a social subject involved in the cultural conflict (Stonequist, 1937). Borrowed from sociology, the concept of marginality spread to other fields of cognition. It was mostly perceived as a negative with regard to the "standard", while deviations from the standard were treated as a violation and threat. Unfortunately, this approach has also penetrated into philosophical studies (including culture and philosophical studies), where the terms "marginality", "marginal", "marginalisation" are used frequently and, in our view, totally unreasonably, with a clear evaluative and negative connotation, this way reducing this concept to a purely destructive explanation. The phenomenon of marginality is interpreted giving it the shade of alienation, cultural cringe and even harmfulness, hostility and aggressiveness. Marginality in the recent Ukrainian thesis in the field of cultural studies is defined as a factor transforming modern forms of cultural life: "The marginal is an individual whose lifestyle and worldview do not correspond to the boundaries acceptable in a certain society. Often these are people who have actually lost their social functions, but are officially considered to be performing them. Such person denies the values of his culture, country or class, but at the same time does not adhere to values of other social groups; thus, is outside the boundaries of culture or class" (Martynova, 2021: 12).

Thus, the concept “marginal” is often used metaphorically rather than as a strictly defined scientific concept. This applies not only to the manifestations of marginality at the level of certain cultural phenomena (primarily avant-garde), whose definition is controversial and time-consuming, or on a plane of subcultures characterised as ambivalent in terms of values and norms, unstable and eclectic. Regrettably, the concept is also employed with regard to entire ethnic, regional, religious and other cultures, whose place in the national cultural space in relation to the national cultural centre is unquestionably marginal in the initial sense of the word: “secondary”, “more distant”. However, does this mean that they are alien, culturally “worse” or hostile?

Therefore, philosophy (primarily cultural philosophy and cultural anthropology) is increasingly trying to assess the concept of marginality differently, emphasizing its cultural originality, non-trivial and non-standard nature, creative potential and ontological value. This position is particularly convincingly expressed by authors such as W. Turner, M. Eliade, M. Epstein, J. Derrida, R. Barth and M. Foucault. Suffice it to mention that the concept “marginality” (Lat. *margo* – boundary, edge, *marginalis* – the one that is on the boundary) can also be defined by directly relating it to the concepts “border” and “limit”. Following this approach, the concept “marginality” is close and sometimes identical to the concept “liminality” (Lat. *limen* – threshold). The concept “liminality” (Turner, 1974), introduced by W. Turner on the basis of A. van Gennep’s research, is an alternative to the structure itself, forcing one to carefully observe what is happening at the edges, because what is new comes from there. Namely due to the semantic merger of “what overcomes limits” and “what eliminates limits” as well as the connotations of social neglect, the concept “liminality” began to be used in cultural studies as a synonym of “marginality”. Indeed, culture is created on borders, and here, it is appropriate to remember M. Bakhtin: “The field of culture has no internal territory: all of it is on the borders, the borders go everywhere, in every moment of it, the systemic unity of culture reaches the atoms of cultural life” (Bakhtin 1974: 266). In this sense, any local culture is marginal. One of the most striking examples of the cultural development of this problem is V. Bibler’s idea of “being between” cultures (Bibler, 1990: 45).

Looking at the cultural situation of the first quarter of the 21st century, it is obvious that it is multifaceted and has a tendency to become even more complex. Profound technological, social, economic, political and other changes that took place over the past century resulted in the increasingly “open” local culture and effective communication, which led to the erasure of social, political and cultural boundaries. This gives rise to the emergence of a new marginalised personality that finds itself between two or more cultures and does not belong to either of them. In fact, in today’s global culture, most people are to some extent close to the marginal and peripheral state (Istileeva, 2010: 3). Considering the future identity of the subject whose self-awareness represents a constant inner dialogue determined by interpretations of cultural texts, O. Bilchenko emphasizes that “the main principle of the person’s self-awareness is transcultural identity – a specific type of thinking, grounded on the combination of loyalty to one’s own and openness to others, identity and tolerance, pluralism and solidarity, universalism and particularism approaches (Bilchenko 2011: 459).

The creative potential of marginality

In this context, the position of an art critic is quite important, since creative resources are the most promising when building new forms of culture. In art criticism, marginality is a position outside the main trends of art and the types of artistic thinking and language; it is a concept that cannot be evaluated – it is neither “good” nor “bad”: “This word lacks permanence... What is outside the

system now may enter it tomorrow. Or may not enter too. What is systemic and even dominant today, will be at the margins of both social structure and art culture tomorrow” (Malyshev, 1999: 62). Thus, the marginal is not only the one who is “left behind” or “lost” but also the one who is ahead. Hence, marginality and marginalisation can destroy culture, but they can also preserve or develop it, depending on the nature of their intentionality (especially orientation towards tradition or innovation). In other words, “marginality is the leaven of newness, the atavism of the old and the distortion of the essence of culture. It is what falls out of line” (Malyshev, 1999: 63). However, is cultural development and cultural diversity possible if everyone “fits in”? The history of scientific and philosophical thought shows that Cynics, Sophists, Gaullists, Troubadours, etc., which researchers categorically consider marginal groups, not only spread new worldviews but in many cases manifested themselves as a real political, socioeconomic and sociocultural force. Considering the global context, the combination of elements of different cultures often leads to the emergence of non-trivial and non-standard things in various activities, creates a rich palette for the development of new directions and ideas (Bykhovskaya, Gorbacheva, 1998: 11).

From this standpoint, the creative potential of marginality is undoubtedly interesting (Melnikova, 2007: 59), since in addition to value and normative ambivalence, non-trivial and non-standard nature, the criteria of the marginality phenomenon also encompass the source, origin, the basis for the creative potential of the individual and the community, their ability to create, interpret and transform. It is well known that the source, inspirer and implementer of innovations are often not the “average” individual or group but those who are on the periphery or edge of the system and therefore “do not fit in”, “break out” of this community, become “hawks”, “dissidents”, etc., i.e., marginals. Creativity certainly does not directly flow from marginality; even more so, marginality is not the only possible source of creativity. This relationship, however, is unconditional, which means that the prevailing negativism towards this phenomenon in the mass consciousness requires the actualization of its creative component through an intra- and extrapolation approach. In other words, through identifying not only external but also internal factors such as the peculiarities of consciousness and unconscious impulses determining the individual’s worldview. The creative and active nature of marginality lies in its characteristic freedom; whose origins manifest themselves in a less strict attachment to value dominants (Melnikova, 2007: 76).

It is also worth mentioning circumstances related to the etymology of the word “marginal”. Originally *marginalis* meant notes, comments, drawings in book margins. It should be noted that even if the followers of the ideas of the Chicago School of Sociology appeal to this meaning, they treat it only as a historical reference. H. Viljoen (1998) in his arguments, on the contrary, shifts this meaning to the position of centrality, defining himself as a marginal who creates marginalities about marginality. In this application, this apparent tautology has a conceptual meaning: as a resident of the “edge of the world” (South Africa) in a postcolonial system of reference, he writes “notes in the margins of the main text”, if we can treat this as the main sociological discourse on marginality (Obolkina, 2018: 13). Emphasizing the importance of the meaning of “edge”, “limit” as the Other, H. Viljoen emphasizes that this Other acts as “...a condition for the production of our discourse (and all positive knowing)” (Viljoen, 1998: 20).

Some researchers draw attention to the proximity of the concept of marginality to P. Bourdieu’s concept “doxa” (e.g., Maares, Hanusch, 2022; Vong, 2022). P. Bourdieu’s Theory of Social Fields is probably the closest to the metaphor of marginality as a void surrounding the field of the text. Doxa is the “main text” – the domain of social automatisms that are transmitted without special effort

because they are ensured by social capital. The field of marginality is essentially the “non-main text”, non-doxa, which the “orthodoxes” are inclined to preserve. It is the “untranslatable Other”, the “heterodox” (“heretic” in Bourdieu’s terms). And this Other is the “limit” of doxa. There are more fundamental philosophical generalizations of this kind too. Self-understanding, as demonstrated by M. Bachtin, is impossible without the interpretation of the *Other*, similarly to the “sociology of the stranger”, formed by H. Simmel’s social philosophy, while M. Buber’s dialogism formed a guideline that has become a classic: I lies in the encounter with You; “one’s own” is determined through the cognition of “the other”. This guideline is important for the analysis of marginality, but only as an intermediate step, because the marginal is both a stranger and a friend. The marginal is not so distant compared with the one who is completely different, he / she is not only dangerous as a stranger but also necessary as a creator of a new “one’s own” (Obolkina, 2018: 14).

As we can see, the concept “marginality” is quite controversial. The marginal is not necessarily a culturally disorienting person, while the destructive type of marginality is not determined by the whole phenomenon and is only one of its forms (along with the constructive one). Being at the intersection of different cultures, the individual can create great things that transcend national coordinates (in this sense, marginals are A. Schnittke, N. Gogol, W. Kandinski – the list is quite long). The contradiction of the concept “marginal” becomes particularly evident when comparing its interpretations in the context of two opposite epistemological directions: on the one hand, in sociology and social psychology, on the other hand, in the philosophy of culture, cultural studies and philosophy of art. Having received its initial theoretical development with a clear negative connotation in sociology and social psychology, for a long time, the content of this concept was widely used similarly in other fields too. Most scientists deny such a narrow interpretation, and some believe that such approach should be eliminated from a truly scientific description of reality (Zaitsev, 2002). In contrast to sociology and sociopsychology, the destructive role of marginality for the individual and society is accentuated. In the cultural dimension, marginality is assessed mostly positively, as a synonym for the concept of creative renewal.

The philosophical understanding of the marginality phenomenon in general receives the growing interest in the context of various philosophical trends and philosophical school traditions. The methodological diversity of research in the said field cannot go unnoticed too. For example, the dialectical approach allows us to perceive formation and emergence processes of marginality, taking place naturally and outside itself; the existential approach, to understand the existence of marginality as freedom, with its multiple possibilities of realisation in the social world; the phenomenological approach, to determine the direct orientation of the phenomenon of “marginality” (destructive or constructive), which has broken in the anthropological and social space, etc. (Zaitsev, 2002: 54). However, despite abundant materials and diverse intellectual efforts, marginality has not yet become a consistent object of the scientific analysis, except for partial (albeit extremely deep) manifestations in the works of M. Foucault, J. Bataille and others. The works of post-structuralists such as J. Deleuze, F. Guattari, J. Derrida, etc. particularly stand out among many philosophical reflections on marginality. The authors reveal the conception of marginality through its comparison with “nomadism”, “decentralization” and other concepts. Perhaps no less important in the formation of the leading set of ideas, which declared interest in the phenomenon of marginality, are Y. Kristeva’s works as well as designing of the rhetoric on postmodern difference and the cult of the Other, alternative, marginal (“an orphan but a creator; a creator but rejected”) (Kristeva, 2003).

A holistic perception of marginality in the migration prospect

An excursus into the history of the problem shows that the concepts “the marginal”, “the out-cast”, “marginalisation” are incomparably more capacious in terms of meaning and intentions than their “caste-based” interpretation in sociology and social psychology. However, it must be admitted that these studies are too fragmentary and do not provide a holistic picture of this problem. In addition, a certain semantic constant of the concept “marginality” has still not been refined. Nevertheless, the constantly increasing fragments of the desired integrity open up new aspects of the knowledge of the phenomenon and create real (and highly needed) prerequisites for reaching the level of practical philosophy and creating methodological foundations for actual socially and culturally significant projects. It must be acknowledged that the most successful and promising searches in this context are in the field of social philosophy, which traditionally focuses on real-life problems (of the society, individual, social relations, institutions, personality development, etc.), seeks to analyse present and past phenomena to gain a deeper understanding of the future, and tries to understand the contemporary society’s functioning and its development prospects.

The holistic understanding of the marginality phenomenon can help in studying and predicting the development of social structures and macrosystems. This is extremely important for social systems experiencing crises due to the inability to cope with excessive flows of non-systemic elements. No less important this knowledge is for the individual who has found himself in a marginal position because of unfavourable life circumstances. Therefore, it must be acknowledged that, despite the fragmentary nature of the philosophical debate on the marginality issue and methodological disunity, the extent of scientific and practical interest in this issue promotes the scientific community to look for certain common principles acceptable for solving the undoubtedly sore social problems related to marginality. One of the most burning problems, which essentially gave rise to intellectual research on marginality, is the migrant problem.

It is characteristic that the term “the marginal” appeared in the scientific literature in the context of the migration problem: R. Park first used it in his essay *Human migration and the marginal man* (Park, 1928), dedicated to the investigation of immigrant processes. R. Park defines the nature of the “marginal man” through the senses of moral dichotomy, break and conflict related to the period of resettlement and transition, defined as the crisis. Meanwhile, the concept of marginality was initially used to study the state after the clash of two different value systems, related to social mobility processes, and to determine the consequences of migrants’ maladjustment due to their dual (multiple) cultural identification. R. Park’s “marginal” is a non-adapted migrant and a product of racial and ethnic “hybridisation”, which essentially results from the same migration and interethnic processes. R. Park owes such a narrow interpretation of the marginal to social processes that actualised this problem (mass migration of Europeans to America at the beginning of the 20th century, the years of the Great Depression, racial segregation, etc.).

E. Stonequist (1961) and subsequent researchers of the marginality phenomenon, using sociology and social psychology, continued R. Park’s line, focusing mainly on interracial and ethnic aspects. In other words, the problem of marginality was understood as a consequence of migration processes and was primarily investigated in the contexts of marginalized people’s socialisation, adaptation to the society and its institutions, and restoration of lost social and cultural ties and roles. Such approach still prevails when studying this phenomenon in social sciences, down to identification of the terms “marginal” and “the migrant”: “Traditionally, migrants who come from regions with prevailing economic stagnation and political instability are referred to as marginals.

Most often, people migrate in search of a job, shelter and safety. To escape war or persecution, get normal housing, education and a stable job are what many migrants and refugees want when they try to start a new life in Europe” (Tymoshenko, 2021: 213). However, without denying migrant marginality (at least during the transitional period), social philosophy offers a broader vision of the problem, distinguishing ethnic, social, religious, political, economic, ideological, etc. marginality with specific features and prospects of socialization and inculturation.

Moreover, in the context of P. Bourdieu’s Theory of Social Fields and the philosophy of the Other, marginality is associated with the category of the social norm, while the norm itself is apophatically determined by the phenomenon of marginality. Marginality can also be understood as a type of consciousness and behaviour, which is not culturally alien (Ukrainian migrants are not identical to the rest of Europe, but they are not alien in terms of culture, religion, etc.), but towards which, through the form of negation, the idea of a certain community’s social norm is created. Although the social function of marginality inevitably includes the potential for destruction (and this is the first thing that meets the eye and is worrying), it is generally constructive: “Not always through conscious manifestations, but always through the fact of their existence, marginalities allow us to raise questions about the benevolence of the norm” (Obolkina, 2018: 16). Therefore, although social philosophy, despite the abundance of accumulated evidence, has not yet prepared strict justifications and universally acceptable solutions, such vision of the problem not only helps to rationalize ideas about marginality, but also enables to create real social projects aimed at overcoming marginality with its destructive manifestations and reasonably support constructive ones. At this point, in our opinion, one more thing should be emphasized: the marginalised migrants’ integration process “...is not necessarily accompanied by the marginal group’s identification with culture... integration may be inferior or only demonstrative, although the degree of integration may be different in later generations (pronounced to a lesser or greater extent)” (Kochetkov, Lukov, 2019: 248).

Finally, it makes sense to remember the fundamental metaphor, which is the cognitive engine of the research process of marginality, indicating its original meaning: marginalis as notes, entries in the margins of books, manuscripts, letters. Thus, both marginalities and marginalis are “outside the text”. At the same time, comments, interpretations, thoughts about the text and considerations the text causes, appearing in the margins, are the body and blood of the text – they contain interesting ideas, unsolved questions, prospects for the development of the topic. However, we are talking about people, and we ask: “Will they become the subject of a new chapter or remain just a note in the margin?”. A lot depends on the willingness of the authors or owners of the “text” to allocate them a free line not in the margins but in the text itself. It also depends on the individual himself, on his will, abilities and perseverance to become part of the whole: either to dissolve like an ellipsis in the existing text, be modestly satisfied with the status of a note or even demand more – the right to turn a new page and even determine the direction of the plot.

CONCLUSION

In the light of the circumstances discussed above, it is appropriate to consider the prospects for further development of Ukraine’s forced migrant and refugee problem in Europe in the context of the migration crisis, focusing on both the refugee’s and the community’s problems and prospects. It should be noted that Europe, realizing objective inevitability of migrant adaptation problems, has already learned certain lessons from previous (not particularly successful) stages of the migration

crisis. Europe gives priority to Ukrainian Christian migrants, restricting opportunities for migrants from other non-Christian countries, this way mitigating the problem of religious assimilation. Migrants are mainly received in Slavic countries, thus lessening the problem of ethnocultural assimilation, and/or in neighbouring countries, mitigating the sociocultural assimilation problem. Therefore, efforts are being made to regulate Ukrainian migrant flows in such a way as to reduce at least the manifestations of ethnocultural, religious and sociocultural marginality, this way concentrating the complex of marginality problems mainly in the social sphere, where they are regulated and legally controlled. Therefore, the further development of the problem may be related to separation of temporary migrants and potential immigrants. The latter are usually the most vulnerable and at the same time the most promising groups from the standpoint of assimilation: children, young people and single women who lost their husbands during the war. With no support at home, they will be looking for opportunities to live in other European countries. In addition to charity as well as social and legal means common to all migrants, assimilation-oriented sociocultural, sociopsychological and sociopolitical types of measures should be expected.

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Representaciones sociales de la guerra en Ucrania en la narrativa de diversos medios de comunicación. Análisis crítico del discurso político

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Resumen. La guerra en Ucrania no solo se desarrolla en la geografía nacional de ambos países, sino, además, en los espacios simbólicos de la opinión pública internacional, espacio comunicacional determinado por una diversidad de posturas políticas e ideologías que oscilan entre el apoyo a la causa de Ucrania o, en contraste, el apoyo a Rusia. En estos contextos discursivos, el objetivo de esta investigación fue el análisis de las representaciones sociales de la guerra en Ucrania en tres medios de comunicación: BBC, CNN y RT. En términos teóricos y metodológicos, se hizo uso del enfoque de las representaciones sociales por su comprobada versatilidad para descifrar el sentido de los discursos. Simultáneamente, se utilizó la técnica del análisis crítico del discurso político, para revelar a la comprensión científica las relaciones hegemónicas y contra hegemónicas que construyen diariamente los actores que participan directa o indirectamente en el desarrollo de esta contienda. Se concluye que cada medio aporta su propia perspectiva influenciada por intereses políticos e ideológicos específicos, lo que resulta en narrativas que pueden variar drásticamente entre sí. Esta realidad comunicacional subraya la importancia de abordar críticamente las fuentes mediáticas para comprender mejor los conflictos contemporáneos en general.

Palabras clave: representaciones sociales de la guerra, medios de comunicación social, guerra en Ucrania, análisis crítico del discurso político, realidad social y poder.

Social representations of the war in Ukraine in the narrative of various media. Critical analysis of political discourse

Abstract. The war in Ukraine is not only taking place in the national geography of both countries, but also in the symbolic spaces of international public opinion, a communicational space determined by a diversity of political positions and ideologies that oscillate between support for the Ukrainian cause or, in contrast, support for Russia. In these discursive contexts, the aim of this research was the analysis of the social representations of the war in Ukraine in three media: BBC, CNN, and RT. In theoretical and methodological terms, the social representations approach was used because of its proven versatility in deciphering the meaning of discourses. Simultaneously, the technique of critical analysis of political discourse was used to reveal to scientific understanding the hegemonic and counter-hegemonic relations constructed daily by the actors who participate directly or indirectly in the development of this contest. It is concluded that each media brings its own perspective influenced by specific political and ideological interests, resulting in narratives that may vary drastically from one another. This communicational reality underscores the importance of critically approaching media sources to better understand contemporary conflicts in general.

Keywords: social representations of war, mass media, war in Ukraine, critical analysis of political discourse, social reality and power.

INTRODUCCIÓN

Las representaciones sociales son construcciones colectivas que permiten a los individuos y grupos interpretar y dar sentido a su realidad social, de modo que se definen entonces como paquetes cognitivos que sirven de modelos interpretativos de la realidad en un grupo determinado, delimitado ontológicamente por un tiempo y espacio particular y diferente a otros. Según Moscovisi (1979), quien introdujo este concepto transdisciplinario, las representaciones sociales (RS) son un tipo de conocimiento que se desarrolla a partir de la interacción social y que se manifiesta en creencias, valores y actitudes compartidas, socializadas por discursos. Por lo que significa heurísticamente, este marco teórico es la clave para comprender cómo se forman las percepciones sobre fenómenos complejos naturales o culturales, como la guerra en Ucrania, donde diversas narrativas mediáticas juegan un papel crucial en la construcción de significados.

En este orden de ideas, las guerras son representadas mediáticamente a través de narrativas que varían según el medio de comunicación y sus intereses particulares. Los medios no solo informan sobre los hechos, sino que también moldean la percepción pública mediante la selección y presentación de información (Chomsky, 2017). Esto significa que cada medio de comunicación social puede enfatizar ciertos aspectos de la guerra que se alinean con sus agendas políticas, económicas o ideológicas en detrimento de otros aspectos silenciados u omitidos deliberadamente. Por lo tanto, la representación de un conflicto armado no es neutral, nunca lo es; está influenciada en cada momento por los contextos sociopolíticos y las relaciones de poder existentes que se dan entre los actores y factores beligerantes.

Para los autores de esta investigación, las fuentes consultadas muestran que un ejercicio básico de análisis comparativo entre medios de amplia difusión internacional, como la CNN, la BBC y Russia Today (RT) revela diferencias significativas en sus narrativas sobre la guerra en Ucrania. Por lo general, la CNN tiende a enfocarse en el sufrimiento humano y las violaciones a los derechos humanos, presentando historias emotivas que buscan generar empatía hacia el pueblo ucraniano. En contraste, la BBC ofrece una cobertura más equilibrada, tratando de re-presentar múltiples perspectivas del conflicto, aunque también se ha visto acusada de sesgo pro-ucraniano. Por su parte, RT adopta una narrativa que justifica acriticamente las acciones rusas, enfatizando la historia y los intereses geopolíticos detrás del conflicto, lo que refleja su alineación con el gobierno ruso y su política belicista. En líneas que siguen se profundizara en estas matrices.

En el marco de los múltiples sentidos y significados que se producen y reproducen continuamente sobre la guerra en Europa del este, el objetivo general de esta investigación es analizar las representaciones sociales de la guerra en Ucrania en tres medios: BBC, CNN y RT. Para ello, se plantean las siguientes preguntas concretas: ¿Cómo se construyen las narrativas sobre la guerra en Ucrania en cada uno de estos medios? ¿Qué elementos discursivos predominan en las representaciones sociales ofrecidas por cada medio? ¿Cómo influyen estas representaciones en la percepción pública del conflicto? Y ¿Qué papel juegan los intereses políticos y económicos en la construcción de estas narrativas? Estas y otras preguntas similares intentan ser respondida, al menos de forma parcial, en esta reflexión.

La justificación para llevar a cabo esta investigación radica en el contexto actual de la era digital, donde abundan los datos contradictorios y la desinformación programa por los factores de poder internacional. En un entorno mediático saturado y condicionado por intereses geopolíticos francamente contradictorios, se impone la necesidad estrategia y científica de poder discernir entre hechos verificables y narrativas manipuladas que pueden distorsionar la realidad internacional. De modo que, la comprensión crítica del discurso político se vuelve esencial para navegar por este paisaje informativo y, al mismo tiempo, para fomentar una opinión pública informada y dispuesta a no ser sistemáticamente manipulada, tal como indico Vasilachis de Gialdino (1999).

El presente artículo se divide en cinco secciones (05). En la primera sección, se hace una revisión teórica general sobre representaciones sociales, puntualizando en la obra de autores clásicos; en la segunda, se describen las bases metodológicas de la investigación; en la tercera se analizan y discuten los resultados obtenidos. Finalmente, se exponen las conclusiones del caso y, por último, se presentan las fuentes consultadas en orden alfabético.

REVISIÓN DE LITERATURA SOBRE REPRESENTACIONES SOCIALES

En líneas generales, la literatura especializada sobre representaciones sociales destaca su papel crucial en la construcción de significados colectivos y su relación con el poder mediático (Moscovisi, 1979; Chomsky, 2017; Vasilachis de Gialdino, 1999; Jodelet, 1986). Autores como Moscovici han explorado cómo estas representaciones emergen dentro de contextos culturales específicos y cómo influyen en las identidades grupales al definir e términos ontológicos y epistemólogos una concepción del mundo (cosmovisión) y de sus fenómenos constitutivos. En el caso de conflictos bélicos como el de Ucrania, las representaciones sociales no solo reflejan opiniones individuales, sino que también configuran climas de opinión que pueden afectar decisiones políticas y movilizaciones sociales a nivel internacional, tal como lo apunte Huntington (2001), en su obra clásica sobre la guerra de civilizaciones.

En cuanto a las representaciones sociales de la guerra, varios autores como Rincón y Avella (2018), han analizado cómo los medios tradicionales y digitales contribuyen a crear narrativas que pueden favorecer o desafiar estructuras de poder existentes. Por ejemplo, todo indica que, durante conflictos armados, los medios tienden a reproducir discursos hegemónicos que legitiman ciertas acciones militares mientras deslegitiman otras. Esto puede observarse claramente en cómo se presentan las fuerzas ucranianas frente a las rusas en diferentes plataformas ¿Cuál es el trasfondo de esta situación recurrente? Al menos para los autores citados, enmarcados en una narrativa postmarxista todo se reduce a que:

Sin medios no hay lobby. Los medios son claves para que las empresas incidan en la toma de decisión política de gobiernos, legisladores y jueces. En este contexto, los medios invocan la libertad de expresión para defender la libertad de empresa; más que informar libremente, son «usados» tácticamente por los conglomerados económicos nacionales y transnacionales para incidir en las decisiones del poder. Esta preeminencia de lo privado en la toma de decisiones es más preocupante en estos tiempos de big data, cuando empresas y poderes vigilan, controlan y dominan (Rincón & Avella, 2018, parr., 1).

En este hilo conductor, y siguiendo a Molero de Cabeza y Cabeza (2009), por lo general, el discurso del poder y del contrapeso se manifiesta también en cómo los medios alternativos o redes sociales han emergido como espacios donde se cuestionan las narrativas dominantes. Estos medios pueden ofrecer perspectivas alternativas que desafían las versiones oficiales presentadas por los grandes conglomerados mediáticos. Sin embargo, también enfrentan desafíos relacionados con su credibilidad, veracidad y alcance. De cualquier modo, la relación entre medios de comunicación social, opinión pública y climas de opinión es compleja. La literatura consultada señala que los medios no solo “informan”, sino que también crean contextos interpretativos que afectan cómo se perciben eventos como la guerra en Ucrania. En consecuencia, la forma en que se presenta un conflicto puede influir significativamente en el apoyo o rechazo público hacia intervenciones militares o políticas específicas como lo demuestra en el caso colombiano el estudio de Pabón Arévalo (2016).

Como se verá a continuación en la sección de metodología, el análisis crítico del discurso se convierte en una herramienta valiosa para desentrañar estas dinámicas de saber y poder. Por lo tanto, a través del estudio interdisciplinario del lenguaje utilizado por los medios para describir el conflicto ucraniano, es posible identificar patrones discursivos que revelan encada momento intereses subyacentes y relaciones de poder entre diferentes actores sociales, de carácter nacional e internacional, intereses que, en definitiva, condicionan las representaciones sociales de una región y hasta de una época, si se entiende que las RS son, esencialmente: “...construcciones simbólicas individuales y/o colectivas a las que los sujetos apelan o las que crean para interpretar el mundo, para reflexionar sobre su propia situación y para determinar el alcance y la posibilidad de su acción histórica” determinar el alcance y la posibilidad de su acción histórica” (Vasilachis de Gialdino, 1998, p. 301).

METODOLOGÍA

Simplificando las cosas con fines expositivos, el diseño metodológico propuesto para esta investigación se basa en el análisis crítico del discurso político, abordando las representaciones sociales desde una perspectiva filosófica. Este enfoque permite examinar cómo el lenguaje utilizado por los medios refleja y reproduce estructuras de poder e ideología relacionadas con la guerra en Ucrania. Mas aun, en análisis crítico del discurso político asume una posición militante que rebasa la erudi-

ción académica tradicional, estrictamente contemplativa de una realidad en conflicto, y es que, al decir de van Dijk (1998):

El análisis crítico del discurso va incluso más allá: toma posición explícita en favor de los grupos dominados, y ofrece instrumentos analíticos para denunciar, exponer y criticar el discurso de la elite y su poder persuasivo en la construcción del consenso y de la hegemonía ideológica. Por ende, aspira a contribuir a las condiciones de resistencia social y política contra las a menudo sutiles formas de dominación en las sociedades contemporáneas (van Dijk, 1998, p. 16).

Guiados por este marco conceptual en el caso específico de esta investigación, las etapas del análisis incluyeron:

- Selección del corpus: Identificación de artículos representativos sobre el conflicto publicados por BBC, CNN y RT.
- Análisis textual: Examen detallado del lenguaje utilizado, centrándose en metáforas, narrativas y estructuras argumentativas.
- Contextualización: Consideración del contexto sociopolítico en el cual se producen estos discursos.
- Interpretación crítica: Evaluación de cómo estos discursos y narrativas contribuyen a construir, continuamente, representaciones sociales específicas sobre el conflicto.

Por lo demás, conviene explicar que los fundamentos epistemológicos de esta metodología cualitativa incluyen enfoques semióticos, retóricos y lingüísticos que permiten una comprensión profunda del discurso como fenómeno social. Al decir de Molero de Cabeza y Cabeza (2009), la semiótica ayuda a descomponer los signos utilizados; la retórica ofrece herramientas para analizar persuasiones; mientras que la lingüística aporta al entendimiento del uso estratégico del lenguaje. Por estas razones, el análisis crítico del discurso político (ACDP), significa la configuración de una mirada integral que permite no solo identificar cómo se construyen las representaciones sociales sobre la guerra en Ucrania, sino también, y este es lo más importante, entender su impacto potencial sobre la opinión pública y las políticas internacionales relacionadas con el conflicto en curso.

ANÁLISIS Y DISCUSIÓN DE RESULTADOS

Como ya se dijo en la introducción, del objetivo de analizar las representaciones sociales de la guerra en Ucrania en tres medios: BBC, CNN y RT. Surgen un conjunto de preguntas ineludibles: ¿Cómo se construyen las narrativas sobre la guerra en Ucrania en cada uno de estos medios? ¿Qué elementos discursivos predominan en las representaciones sociales ofrecidas por cada medio? ¿Cómo influyen estas representaciones en la percepción pública del conflicto? Y ¿Qué papel juegan los intereses políticos y económicos en la construcción de estas narrativas? En buena medida, las piezas discursivas seleccionadas como corpus de esta investigación serán interpeladas, a continuación, desde las implicaciones de estas preguntas, como condición de posibilidad para construir una respuesta adecuadas a las estas.

Análisis de las representaciones sociales de la guerra en Ucrania

La BBC ha sido un medio que se esfuerza por ofrecer una cobertura equilibrada y detallada sobre la guerra en Ucrania. En un artículo reciente intitulado: *Can Ukraine face another year of war?* la BBC analiza la situación crítica de las fuerzas ucranianas, que enfrentan un desgaste significativo tras tres años de conflicto. La publicación resalta cómo los soldados, que provienen de diversos orígenes, están mentalmente preparados para una larga lucha, a pesar del agotamiento físico y emocional.

En sus notas de prensa, comúnmente la BBC también menciona que, aunque hay un interés en las partes beligerantes en desarrollar las condiciones para el logro de diálogos de paz, lo que significa, aunque, por ahora, posibilidad de un acuerdo viable parece lejana, reflejando una narrativa que enfatiza tanto el sufrimiento humano como la resistencia del pueblo ucraniano frente a la agresión rusa. En la nota analizada es muy realistas al destacar que:

Ukraine is losing the battle on the ground. Many of its soldiers are tired and exhausted after three years of fighting. The question – can the country endure another year of war?

Their forces are still resisting Russian advances in the east. But they're almost surrounded near the town of Kurakhove – scene to some of the most intense fighting in recent weeks.

The Black Pack, a mortar unit, is trying to prevent their encirclement around Kurakhove. The Russian are closing in on three sides.

We meet the team at a safe house, getting a rest from the fighting. They're not your average soldiers. They include a vegan chef, a mechanic, a web developer, and an artist. A group of friends with non-conformist views. Some call themselves anarchists. They all volunteered to fight (Beale, 2024, parr., 1).

En su línea editorial, la BBC ha utilizado mapas interactivos para ilustrar el avance de las fuerzas rusas y las contraofensivas ucranianas. Normalmente este prestigioso medio publico inglés, presenta a sus lectores un informe detalla cómo las tropas ucranianas han realizado incursiones en territorio ruso, lo que ha llevado a una respuesta militar significativa por parte de Moscú. Este enfoque visual permite a los lectores comprender mejor la dinámica del conflicto y los cambios territoriales, al tiempo que subraya la complejidad del escenario bélico en el este de Ucrania. Por estas razones, la *British Broadcasting Corporation* BBC se presenta como un medio serio que intenta ofrecer una visión comprensiva y matizada del conflicto, aunque su enfoque puede ser interpretado como pro-ucraniano debido a su énfasis en la resistencia y el sufrimiento del pueblo agredido en el conflicto.

La CNN, por su parte, ha adoptado una narrativa más centrada en los eventos inmediatos y sus repercusiones. Un artículo reciente titulada: *'Furious battles are underway': Kursk residents call on Putin for help after Ukrainian incursion* describe cómo las fuerzas ucranianas han llevado a cabo incursiones en la región de Kursk, sorprendiendo incluso a funcionarios estadounidenses. En este ejemplo, la cobertura se centra en las afirmaciones rusas sobre la contención de estas incursiones y, al mismo tiempo, destaca el impacto que tienen en la percepción pública del conflicto. CNN enfatiza el papel activo de Ucrania en la defensa de su territorio y presenta una narrativa que apoya su derecho a defenderse frente a la agresión rusa que quiere destruir la soberanía nacional del Estado ucraniano, como país independiente. Por lo demás, en estas notas de prensa no se soslaya el impacto geopolítico de la guerra para los vecinos de la Unión Europea, bloque aliado de los Estados Unidos de América:

IMAGEN 1. Territorio afectado por la guerra.



Fuente: (BBC News, 2024).

A Russian military blogger Rybar reported on Wednesday that the Ukrainian military had established control over a gas transit station near the border. The blogger said the station is the only one through which gas from Russia flows to Ukraine and then to Europe. CNN cannot confirm that reporting.

The European Union has imposed wide-ranging economic sanctions on Russia – with the exception of key natural gas imports. The EU was dependent on Russian gas and while it has slashed imports from Russia from 45% of all gas imports in 2021, to 15% of EU gas imports in 2023, some Russian gas still continues to flow to Europe through Ukraine, despite the war (Tarasova, Sciutto, Goodwin, Lister, & Kottasová, 2024, parr., 11 y 12).

Desde el punto de vista de los autores de esta investigación, otro aspecto importante en la cobertura de CNN es su análisis sobre cómo el conflicto ha sido desplazado, en términos mediáticos, por otros eventos noticiosos globales, como el conflicto entre Israel y Hamas, en pleno desarrollo en Oriente Medio. Este cambio en el enfoque mediático ha llevado a una disminución notable en la atención prestada a la guerra en Ucrania, lo que podría influir en la percepción pública sobre la urgencia y gravedad del conflicto y en las representaciones sociales de esta guerra que se generan en la escena internacional. Y es que, a medida que otras crisis emergen, CNN destaca cómo esto puede beneficiar indirectamente a Rusia al disminuir la presión internacional sobre sus acciones y crímenes de guerra, tal como destaca Darcy (2023).

En franco contraste con CNN y la BBC, Russia Today (RT) presenta una narrativa completamente diferente sobre la guerra en Ucrania. Este medio estatal ruso enfatiza las acciones defensivas

de Rusia y justifica en cada momento su intervención como una respuesta geopolítica y geoestratégica necesaria a las amenazas percibidas desde Occidente, mediante la “acción belicista: de la Organización del Tratado del Atlántico Norte OTAN en Europa del este desde la caída de la URSS en la última década del siglo pasado. En consecuencia, en sus reportajes, RT tiende a minimizar las violaciones de derechos humanos cometidas por las fuerzas rusas y presenta a Ucrania como un “país dividido y corrupto”, alineado con intereses occidentales. Esta representación discursiva busca legitimar las acciones rusas al retratar el conflicto como una lucha contra el imperialismo occidental. Veamos algunos ejemplos:

El 2024 ha sido todo un fracaso, además de un año trágico, para el líder del régimen de Kiev, Vladímir Zelenski, estima el exdiputado Víktor Medvedchuk, líder del principal movimiento opositor ucraniano La Otra Ucrania.

En un artículo publicado este lunes, el político señala como razones de este balance negativo el hecho de que Zelenski perdiera su legitimidad como presidente de Ucrania, después de que expirara su mandato el pasado mes de mayo. “A diferencia de [el presidente de Rusia] Vladímir Putin, [Zelenski] temía celebrar unas elecciones sabiendo que las perdería”, destaca Medvedchuk (Marco Tacca, 2024, parr., 2).

RT también aborda las narrativas sobre el sufrimiento humano, pero lo hace desde una perspectiva que intenta desviar la culpa hacia Occidente y sus aliados. Por ejemplo, los informes sobre las bajas civiles son presentados con un enfoque crítico hacia los suministros militares occidentales a Ucrania, sugiriendo que estos contribuyen al sufrimiento del pueblo ucraniano. Esta estrategia discursiva busca crear confusión y desinformación sobre los hechos reales del conflicto y niegan la legítima defensa del pueblo ucraniano ante la impronta de las fuerzas invasoras. Veamos otro ejemplo:

Los ministros de Defensa de la OTAN, que asistieron a la reunión del Grupo de Contacto para la Defensa de Ucrania, se mostraron molestos por la situación en ese país, declaró este viernes el jefe de Defensa de Polonia, Wladyslaw Kosiniak-Kamysz.

El alto cargo polaco indicó a la emisora de radio local RMF FM que Kiev se enfrenta a importantes dificultades en el conflicto con Moscú, mientras que los propios ucranianos ya están cansados de la confrontación. “El ambiente [tras la cumbre en formato Ramstein] no es bueno, tengo que decirlo sin rodeos. [...] En primer lugar, la difícil situación en Ucrania. La situación en el frente es realmente muy difícil, la fatiga de la guerra en Ucrania es enorme y la gente ya está harta”, subrayó (Arnold, 2025, parr., 1 y 2).

En síntesis, desde una perspectiva pro-ucraniana, los medios como BBC y CNN enfatizan la resistencia del pueblo ucraniano frente a una agresión injustificada y, al mismo tiempo, destacan el sufrimiento humano causado por el conflicto. A través de narrativas que subrayan tanto el heroísmo como los desafíos enfrentados por Ucrania, estos medios buscan generar empatía y apoyo internacional hacia el país agredido por la impronta del imperialismo post soviético liderado por Vladimir Putin y su gobierno.

CONCLUSIONES SOBRE LAS NARRATIVAS MEDIÁTICAS

Ante la pregunta ¿Cómo se construyen las narrativas sobre la guerra en Ucrania en cada uno de los medios abordados? Se debe responder que, estas narrativas sobre la guerra en Ucrania se construyen de manera diferente según cada medio. La BBC tiende a ofrecer un análisis más equilibrado,

pero con inclinaciones pro-ucranianas al resaltar tanto los éxitos como los desafíos enfrentados por Ucrania. Por otro lado, CNN se enfoca más en eventos inmediatos y sus repercusiones políticas globales, lo que puede llevar a una percepción fluctuante del conflicto dependiendo de otros eventos noticiosos.

En cuanto a la pregunta, ¿Qué elementos discursivos predominan en las representaciones sociales ofrecidas por cada medio? Todo indica que, los elementos discursivos predominantes varían, como es natural, entre cada medio y su agenda comunicacional: mientras que BBC utiliza un lenguaje descriptivo y analítico para presentar hechos complejos, CNN tiende hacia un estilo más narrativo e inmediato que resalta situaciones específicas. En contraste, RT utiliza un lenguaje justificativo que busca legitimar siempre las acciones rusas al presentar una imagen distorsionada del contexto geopolítico de la guerra.

¿Cómo influyen estas representaciones en la percepción pública del conflicto? Desde el punto de vista de los autores de esta investigación, estas representaciones influyen significativamente en la percepción pública del conflicto de muchas maneras diferentes. Por ejemplo, la cobertura pro-ucraniana fomenta una mayor empatía hacia el pueblo ucraniano y puede aumentar el apoyo internacional para su causa. En cambio, RT intenta crear confusión y desinformación para deslegitimar a Ucrania ante los ojos del público global.

Finalmente, ante la pregunta ¿Qué papel juegan los intereses políticos y económicos en la construcción de estas narrativas? Sin lugar a duda, los intereses políticos y económicos juegan un papel crucial en estas narrativas. Los medios occidentales suelen estar alineados con gobiernos que apoyan a Ucrania, lo cual se refleja en su cobertura favorable hacia este país. Por otro lado, RT actúa como un vehículo ideológico para difundir propaganda rusa, buscando justificar sus acciones militares bajo el pretexto de defensa nacional. Por lo tanto, las representaciones sociales de la guerra en Ucrania son complejas y multifacéticas. Cada medio aporta su propia perspectiva influenciada por intereses políticos e ideológicos específicos, lo que resulta en narrativas que pueden variar drásticamente entre sí. Esta realidad comunicacional subraya la importancia de abordar críticamente las fuentes mediáticas para comprender mejor los conflictos contemporáneos en general.

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La imagen de la maternidad como fenómeno sociocultural: un estudio cualitativo-cuantitativo de la obra de Maya Angelou

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Resumen. La poesía de Maya Angelou aborda temas de identidad, resistencia y las luchas a las que se enfrentan las mujeres, haciendo hincapié en la imagen de la madre. Este trabajo explora la representación de la madre en la obra poética de Angelou, centrándose en su papel como símbolo de identidad cultural y encarnación de la fuerza emocional y espiritual. A través de un enfoque crítico temático, este estudio examina cómo Angelou entrelaza las experiencias personales con la memoria colectiva para representar la figura de la madre de un modo que trasciende las nociones tradicionales, entretejiendo reflexiones socioculturales más amplias sobre la maternidad. Utilizando una combinación de métodos cuantitativos y cualitativos, el artículo analiza la prevalencia de las figuras femeninas, en particular las madres, en “The Complete Collected Poems” (1994) de Angelou, clasificando su representación a través de varias dimensiones como el amor, el sacrificio, la opresión racial y el orgullo cultural. En última instancia, este estudio destaca la centralidad de la maternidad en la exploración que Angelou hace de la feminidad, ofreciendo una comprensión más profunda de sus contribuciones literarias a las tradiciones literarias feminista y afroamericana.

Palabras clave: poesía, representación de la mujer, imagen de la madre, Maya Angelou, maternidad.

The image of motherhood as a socio-cultural phenomenon: a qualitative-quantitative study of Maya Angelou's works

Abstract. Maya Angelou's poetry engages with themes of identity, resilience, and the struggles women face, with an emphasis on the image of the mother. This paper explores the representation of mothers in Angelou's poetic works, focusing on their roles as symbols of cultural identity, and embodiments of emotional and spiritual strength. Through a thematic critical approach, this study examines how Angelou intertwines personal experiences with collective memory to depict the figure of the mother in a way that transcends traditional notions, weaving in broader socio-cultural reflections on motherhood. Using a combination of quantitative and qualitative methods, the paper analyzes the prevalence of female figures, particularly mothers, in Angelou's "The Complete Collected Poems" (1994), categorizing their portrayal across various dimensions such as love, sacrifice, racial oppression, and cultural pride. Ultimately, this study highlights the centrality of motherhood in Angelou's exploration of womanhood, offering a deeper understanding of her literary contributions to feminist and African American literary traditions.

Key words: poetry, representation of women, image of mother, Maya Angelou, mothering.

INTRODUCTION

Maya Angelou's poetry is deeply rooted in thematic representations of womanhood, race, and resilience, particularly as experienced by Black women in America. Her work reflects a feminist and African American literary tradition that prioritizes personal narratives as a means of conveying broader socio-cultural issues. Central to her exploration of these themes is the image of the mother, who is portrayed as a multifaceted figure embodying love, sacrifice, cultural identity, and spiritual strength. The thematic approach considers the diverse roles mothers play in Angelou's work, from emotional anchors to symbols of resilience in the face of racial oppression. Poems such as "Mothering Blackness" and "Woman Work" reflect the duality of motherhood, where the mother is depicted both as a source of comfort and as a figure burdened by societal expectations and struggles (Angelou, 1994). Angelou often juxtaposes nurturing imagery with the harsh realities of racial and gender-based oppression, thus creating a complex narrative of what it means to be a mother in the Black American experience. By emphasizing themes such as cultural pride, personal sacrifice, and spiritual fulfillment, Angelou's poetry serves as both a personal reflection and a socio-cultural critique.

THEORETICAL ASPECTS

Mothering has been a central theme in literary studies, social theory, psychology, and feminist studies, with scholars examining the expectations, roles, and images associated with motherhood across various cultures and historical periods. Mothers are often idealized as the foundation of moral and social order, leading to the perception of the mother as a figure responsible for shaping not only individual children but also society as a whole. Scholars have introduced theoretical concepts surrounding mothering, such as "Intensive Mothering" (Hays, 1996), which refers to the expectation

that mothers must be highly involved, nurturing, and attentive to their children's needs, often relying on expert advice rather than personal intuition. This ideology has become a dominant cultural narrative, positioning mothers as responsible for their children's future success or failure, frequently at the expense of their own desires and identities (Hays, 1996). Sociologists Ulrich Beck and Elisabeth Beck-Gernsheim (2002) argue that the advice offered by experts has transformed motherhood into a serious responsibility. Beginning in the mid-20th century, mothers became increasingly reliant on childcare manuals and professional advice, seeing themselves as caretakers whose actions could have significant long-term effects on their children's development (Beck & Beck-Gernsheim, 2002). Martin Woodhead (1997) discusses how the needs of children and the role of mothers are shaped by cultural projections. She argues that professional advice on parenting creates an image of what children supposedly need, which mothers are expected to fulfill, based on adult societal values rather than the actual needs of children (Woodward, 1997). The other scholars highlight the societal pressures and expectations placed on mothers, reinforcing the notion that motherhood is not just a personal role but a culturally constructed and socially enforced identity (Ruddick, 1983).

In alignment with thematic, feminist and post-colonial critiques (Glenn, 1994), Angelou's representation of the mother figure also reclaims the maternal image from patriarchal and Eurocentric narratives, presenting the mother as a source of empowerment (Bell, 1979). This analysis of Angelou's poetic themes provides a critical framework for understanding how the poet elevates the maternal figure to a symbol of cultural and emotional resilience, deeply intertwined with the collective experience of African American women.

METHODS AND METHODOLOGY

This paper employs a mixed-methods approach, combining both **quantitative** and **qualitative** analyses to explore the representation of mothers in Maya Angelou's poetry. The methodology is designed to provide a comprehensive understanding of the prevalence and significance of the maternal figure in Angelou's work, while also offering in-depth thematic analysis.

Quantitative analysis was conducted on *The Complete Collected Poems of Maya Angelou* (1994), focusing on the number of times women are referenced and how many poems are explicitly dedicated to them (Angellou, 1994). Out of the 167 poems in the collection, 1227 instances of female representation were recorded, with 37 poems specifically dedicated to women, and 12 focused on mothers. This quantitative data offers insight into the prominence of the female experience, particularly motherhood, within Angelou's body of work. A specific focus is given to poems where the mother figure plays a central role in conveying broader thematic messages, such as resilience, love, and cultural pride.

Qualitative aspect of the study involves a **thematic analysis** of selected poems, particularly those in which mothers are portrayed, such as "Mothering Blackness", "Woman Work," and "A Song Flung Up to Heaven". Each poem is examined for recurring motifs, metaphors, and symbols that contribute to the representation of the mother as a figure of emotional and cultural significance. This analysis seeks to uncover how Angelou uses imagery and metaphor to convey the maternal experience within a broader socio-political context. By drawing on feminist and post-colonial theoretical frameworks, this study explores the intersection of race, gender, and motherhood in Angelou's work.

Categorization and symbolic interpretation were held to categorize the portrayal of mothers in Angelou's poetry, a detailed symbolic interpretation of the mother as a protector, nurturer, cultural anchor, and spiritual guide is conducted. This involves close readings of selected poems, focusing on the recurring symbols associated with motherhood, such as warmth, home, shelter, and heritage. Additionally, the use of cultural and religious imagery in Angelou's depiction of mothers is explored, particularly in relation to African American identity and the historical experience of Black women in the United States.

Diagrammatic representation is used to visually represent the categorization of women in Angelou's poetry, with a particular focus on mothers. This helps to illustrate the central role that the maternal figure plays within the broader thematic framework of Angelou's work.

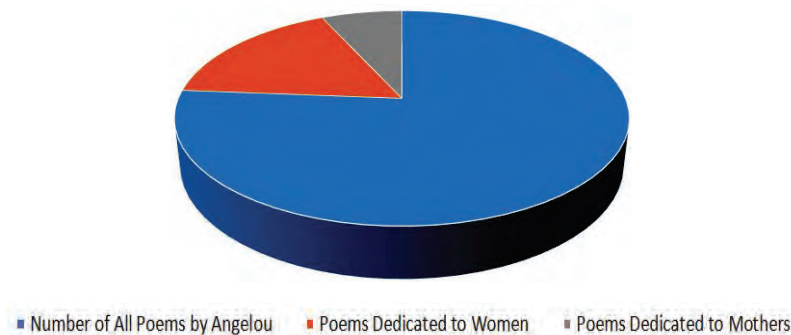
By using this combination of methods, the study provides a multifaceted view of how Angelou represents the image of the mother in her poetry, offering both statistical evidence and detailed thematic interpretation. The mixed-methods approach allows for a nuanced understanding of Angelou's portrayal of motherhood as both a personal and a collective experience, deeply rooted in cultural, racial, and gendered identities.

THE REPRESENTATION OF WOMEN IN ANGELOU'S POETRY

Maya Angelou, a celebrated poet and author, often portrayed the image of women in her poetry, particularly emphasizing themes such as identity, resilience, and the struggles women face. Among her depictions, the image of the mother is especially profound, where she intertwines personal experiences, collective memory, and socio-cultural reflections on motherhood. This paper will examine how Angelou represents women, especially mothers, by analyzing selected poems from *The Complete Collected Poems of Maya Angelou* (Angelou, 1994). Using both quantitative and qualitative methods, we will explore the prevalence of women and mothers in her poetry and categorize their portrayal.

Before exploring the specific representation of mothers, it is essential to assess how women are portrayed overall in Angelou's poetry. A quantitative analysis of the 167 poems in *The Complete Collected Poems of Maya Angelou* reveals that women are mentioned in 1227 instances. Out of these, 37 poems are explicitly dedicated to women, which constitutes 22.15% of her total poetic work. Additionally, 110 of the 167 poems (approximately 65.87%) are narrated from the perspective of female speakers. This analysis underscores Angelou's significant focus on women, making the female experience, in various forms, a central theme in her body of work.

Graph 1. Number of women represented in Maya Angelou's poetry



From this analysis, it is clear that women occupy a critical space in Angelou's poetry, whether as subjects or speakers. Mothers, in particular, emerge as symbolic figures who embody strength, resilience, love, and sacrifice. Angelou often uses the image of the mother to address broader societal issues, such as racial oppression and the collective experiences of African American women.

CATEGORIZATION OF WOMEN IN ANGELOU'S POETRY

A detailed analysis of the 37 poems dedicated to women allows us to categorize the representation of women into various types. Among these categories, mothers stand out as figures of nurturing, sacrifice, and emotional resilience. We identified five primary categories: the poetess herself, oppressed women, confident women, goddesses, and mothers. Each category represents a specific aspect of womanhood, but for the purposes of this paper, we will focus on the portrayal of mothers.

The image of mother in Angelou's poetry

One of the central ways in which Angelou represents the image of the mother is through her dual role as a nurturer and a figure of sacrifice. This duality is especially apparent in the poem *Mothering Blackness*, where the mother is depicted not only as a beloved figure but also as someone who has endured pain and oppression. The opening lines set the tone for this characterization:

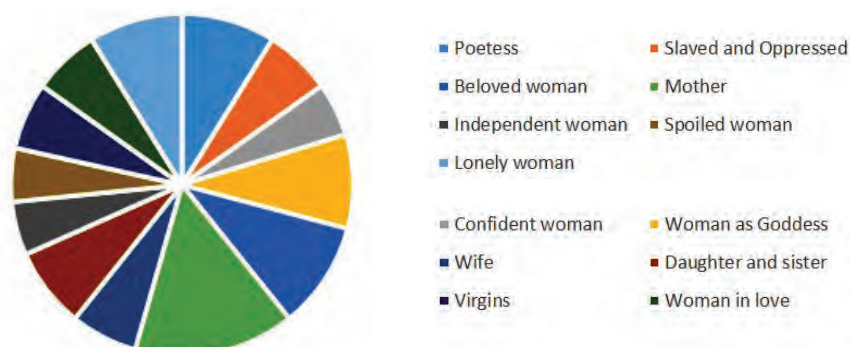
"She came down creeping / here to the black arms waiting / now to the warm heart waiting..." (Angelou, 1994: 51).

In these lines, Angelou uses imagery such as "black arms" and "warm heart" to depict the mother as a comforting and nurturing presence. The maternal figure is the one who is constantly awaited and cherished, signifying the deep bond between mother and child. However, this depiction is layered with the history of racial oppression and suffering, as seen in the following lines:

"Deep in the smothering blackness / white tears icicle gold plains of her face / She came home running..." (Angelou, 1994: 51).

Here, Angelou juxtaposes the mother's nurturing role with her status as an oppressed figure. The "white tears" and "icicle" imagery convey the deep emotional pain she has endured, symbolizing the historical suffering of Black women. The mother's return home signifies both an escape and a return to the safety of her familial role.

Graph 2. Representation of the image of women in Maya Angelou's poetry



In this diagram, the representation of women in Maya Angelou's poetry is broken down into various categories, with a specific focus on the figure of the mother. The diagram shows that out of a set of poems dedicated to women, 12 are specifically categorized as focusing on the mother. This highlights the prominence of motherhood in Angelou's portrayal of women. The diagram further classifies other representations of women, showing that Angelou also explores various aspects of womanhood, including the poetess, oppressed women, goddesses, beloved women, and others. Each category explores the diverse experiences and roles women occupy in Angelou's work, but the significant number of poems (12) focusing on mothers suggests that motherhood holds a central place in her poetic exploration of womanhood.

In Maya Angelou's poetry, the image of the mother transcends traditional roles, capturing the multifaceted nature of motherhood. Angelou's portrayal of the mother figure is rich and varied, embodying love, trust, a connection to homeland, spirituality, and cultural pride.

Graph 3. Representation of the image of mother in Maya Angelou's poetry



Mother as Love

In the lines, “And you will learn the words of love / Mother Brother Father Sister Lover Friend” (Angelou, 1994: 86), Angelou presents the mother as a fundamental source of love and nurturing. She connects the figure of the mother to universal bonds of affection and care, equating maternal love with the love shared among family members, friends, and romantic partners. This passage suggests that a mother's love is central to learning how to love others and oneself. It speaks to the idea that the mother is a primary, formative source of affection, teaching the child the very language of love and relationships.

Mother as Confidante

In the excerpt where the daughter confides in her mother—“Of all he said, I understood / he said he loved another” (Angelou, 1994: 132)—the mother is portrayed as a trusted confidante. The daughter, feeling hurt by love, seeks her mother's wisdom and comfort. This passage highlights the mother's

role as a listener and emotional anchor, offering guidance and solace during moments of emotional vulnerability. The mother-daughter bond is deepened through this sharing of personal pain, demonstrating the trust and support that is intrinsic to their relationship. The mother's dry-eyed demeanor suggests strength, patience, and an understanding of the complexities of life and love.

Mother as Homeland (Africa)

Angelou metaphorically links the mother to the African homeland in the vivid and richly symbolic imagery of her poem: "Taste me fruit / its juice free-falling from / a mother tree. / Know me / Africa." (Angelou, 1994: 147). Here, the "mother tree" becomes a powerful metaphor for Africa, representing roots, sustenance, and cultural identity. The mother is depicted as the origin of life and the preserver of cultural heritage. Africa, as the mother, is a source of strength, history, and belonging for those of African descent. In this poem, the connection between mother and homeland symbolizes the nurturing and life-giving role of both, suggesting that just as the mother nourishes her child, Africa nourishes the spirit and cultural identity of its people.

Mother as Heaven

Angelou explores the spiritual dimension of motherhood in the lines, "You said that / You would take me to glory / To sit down at the welcome table." (Angelou, 1994: 271). In this portrayal, the mother is associated with the promise of heaven, eternal life, and divine peace. She is not only a source of earthly comfort but also a guide who leads her child toward spiritual fulfillment and salvation. The mention of the "welcome table" evokes Christian imagery of paradise, where loved ones are reunited after death. This reinforces the idea that the mother transcends the physical world and becomes an eternal figure of love and protection. In the final lines—"Rejoice with my mother in heaven / And I'm stepping out on Your word" (Angelou, 1994: 292)—Angelou once again links the mother to the idea of heaven and salvation. The mother is portrayed as a figure who has passed on but continues to inspire strength and resilience in her child. The act of "stepping out on Your word" suggests that the speaker is continuing to live in faith, guided by the lessons and love of her mother, now in heaven. This imagery of the mother as a heavenly figure underscores her role as a constant source of strength, even in death.

Mother as Cultural and Personal Pride

In the passage "White folks used to stop / My mother / Just to look at me. / (All black babies / Are Cute.)" (Angelou, 1994: 293), Angelou touches upon the theme of cultural pride and identity through the mother's eyes. The mother here is proud of her child, despite the racial dynamics at play, and this pride reflects a broader sense of resilience and self-worth in the face of societal prejudice. The humor and subtle irony in the phrase "(All black babies / Are Cute)" points to Angelou's critique of the fetishization of Black children by white people, but it also highlights a mother's unwavering admiration for her child. This moment reinforces the mother's role as a source of cultural pride and personal identity.

Mother as a Symbol of Strength and Resilience

In addition to her role as a nurturer, the mother in Angelou's poetry often symbolizes strength and emotional resilience. The poem *Woman Work* exemplifies this representation, where the speaker lists her endless tasks and responsibilities:

“I’ve got the children to tend / The clothes to mend / The floor to mop / The food to shop / Then the chicken to fry / The baby to dry...” (Angelou, 1994: 241).

The repetitive structure and rhythm of these lines emphasize the relentless nature of a mother’s work. The speaker’s long list of tasks suggests a life of continuous labor, yet it also reveals the strength of the mother figure. Despite the overwhelming demands placed upon her, she endures. The poem highlights the unacknowledged toil of women, particularly mothers, in their daily lives.

Angelou contrasts this depiction of physical labor with a moment of yearning for personal freedom: “Fall gently, snowflakes / Cover me with white / Cold icy kisses and / Let me rest tonight...” (Angelou, 1994: 241). Here, the mother expresses a desire for rest, revealing her vulnerability amidst her strength. This juxtaposition of labor and longing encapsulates the emotional complexity of motherhood, where personal needs are often sacrificed for the well-being of others.

The mother figure in Maya Angelou’s poetry, the maternal image broadens even further in these additional excerpts, particularly emphasizing themes of empowerment, cultural return, and the maternal strength that transcends individual experience. Here’s an analysis of the mother’s portrayal in these new examples:

Mother as Protector and Moral Guide

In “I start no wars, raining poison / on cathedrals, melting Stars of David / into golden faucets” (Angelou, 1994: 37), the speaker reflects on the mother’s influence as a moral compass, one who has instilled values of peace and respect for life. This passage portrays the mother as a protective and guiding figure, someone who has shielded her child from moral corruption and violence. The imagery here contrasts acts of destruction—war, desecration of religious symbols, and inhumane cruelty—with the mother’s role in teaching restraint and ethical responsibility. The mother is shown to have endowed her son with the capacity for resistance against societal evils, positioning her as a force that counters destructive impulses with nurturing wisdom.

The concluding lines, “They say you took my manhood, Momma. / Come sit on my lap / and tell me, what do you want me to say / to them, just / before I annihilate / their ignorance?” (Angelou, 1994: 370), reveal the depth of the son’s bond with his mother. The assertion that society accuses the mother of “taking his manhood” speaks to the tension between traditional notions of masculinity and the softer, nurturing qualities associated with motherhood. However, instead of rejecting his mother’s influence, the son embraces it, seeking her counsel in moments of conflict. His desire to “annihilate their ignorance” implies that he has internalized his mother’s wisdom and strength, ready to challenge misconceptions imposed by a patriarchal society.

Mother as Shelter, Identity, and Return to Origins

In “The Mothering Blackness,” Angelou evokes powerful imagery of the mother as a place of return—a shelter, a sanctuary from the outside world. The repeated phrase, “She came home running,” (Angelou, 1994: 51) signifies the longing for the safety and comfort of the mother, particularly in times of alienation or despair. The mother here represents protection and unconditional acceptance, welcoming the speaker back from experiences of hardship and alienation. The use of the term “mothering blackness” suggests both a physical and symbolic return to roots—an embrace of African identity and the shared experience of Blackness. The lines “She came home blameless / black yet as Hagar’s daughter / tall as was Sheba’s daughter” (Angelou, 1994: 51) invoke biblical

and royal imagery. Hagar, a figure from the Bible, is often associated with resilience, survival, and exile, while the reference to Sheba suggests nobility and strength. Angelou positions the mother as a towering figure of strength and dignity, connected to ancestral lineage. This not only emphasizes the mother's protective qualities but also links her to a broader cultural and historical legacy. The mother's blackness is not just a personal identity but also a collective, cultural one that serves as a point of pride and solidarity in the face of external threats. The imagery of the "black arms waiting" and the "warm heart waiting" reinforces the theme of the mother as a figure of emotional refuge. She provides a place where the speaker can find solace, healing, and strength. The phrase "threats of northern winds die on the desert's face" (Angelou, 1994: 51) further highlights the mother's role as a shield, standing firm against external challenges and providing a protective barrier against the cold, harsh forces of the world.

Mother as Cultural and Emotional Anchor

In these examples, Angelou continues to present the mother as a multi-dimensional figure, emphasizing not only her nurturing and protective qualities but also her role in shaping identity, resilience, and moral integrity. The mother is depicted as a figure who provides emotional and cultural grounding, a source of both strength and refuge in times of internal or external conflict.

In "Son to Mother," the mother is the moral center who instills values that protect her child from the destructiveness of the world, while "The Mothering Blackness" portrays her as a place of return, of cultural pride, and of emotional healing. The mother's blackness, symbolic of identity, history, and shared struggle, is celebrated as a source of dignity and empowerment.

CONCLUSION

Maya Angelou's portrayal of motherhood is a profound and nuanced reflection of love, resilience, and cultural significance. Through her poetry, Angelou elevates the image of the mother from traditional notions of caregiving to a broader symbol of strength, moral guidance, and cultural pride. The mother is portrayed not only as a nurturer but also as a confidante, a guardian of identity, and a spiritual guide. Poems like "Mothering Blackness" and "Woman Work" encapsulate the complexities of motherhood, blending the personal experiences of African American women with broader historical and societal contexts. Angelou's work highlights how mothers embody both individual and collective resilience, standing as pillars of emotional support while also representing the struggles and triumphs of their communities. Her exploration transcends the domestic sphere, showing the mother as a powerful figure who navigates multiple roles—protecting, loving, and guiding, all while confronting the harsh realities of racial and gender oppression. Angelou's maternal figures are thus central to her depiction of womanhood, symbolizing the intersection of personal sacrifice and cultural endurance. By integrating both quantitative content analysis and deep qualitative insight, this paper has demonstrated the centrality of the maternal figure in Angelou's work. Whether through expressions of unconditional love or as symbols of cultural and spiritual identity, Angelou's mothers serve as enduring emblems of strength, continuity, and empowerment. The representation of motherhood in Angelou's poetry is a testament to the lasting impact of mothers on both individual lives and the collective consciousness of society.

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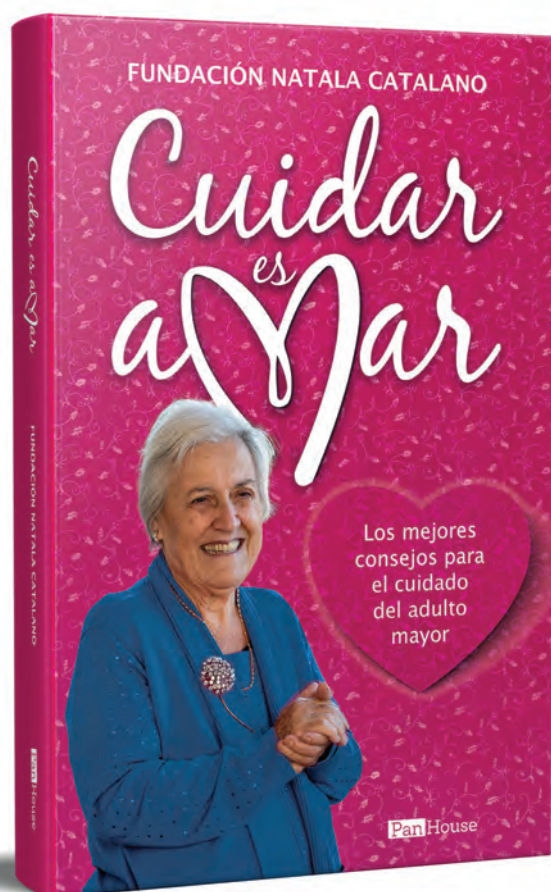
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RECENSIÓN



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Escuela para Cuidadores no Profesionales de Adultos Mayores en el hogar

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Esta publicación, *Cuidar es Amar, los mejores consejos para el cuidado de las personas mayores en el hogar*, ha sido escrita para personas que se dedican o quieren convertirse en excelentes cuidadores no profesionales de personas mayores, sanas o enfermas, especialmente en sus hogares. La Guía tiene como ejes articuladores los conceptos concernientes a la *ética*, al *buen trato* y al *cuidado humanizado*, fundamentales para ofrecer un verdadero cuidado integral.

Reconocemos el valor y la importancia del rol que desempeñan los cuidadores no profesionales de personas mayores en el hogar, para promover su bienestar integral, hecho que nos compromete a ofrecerles algunas indicaciones que, estimamos, pueden ayudarlos a fortalecer y desarrollar sus capacidades y competencias para cumplir su rol con excelencia, satisfacción, seguridad y destrezas.

Esperamos que los contenidos incluidos en esta Guía les resulten de interés a los lectores, que encuentre respuestas a sus inquietudes, además de información fundamental para convertirse en cuidadores calificados de personas mayores, de manera que, al ponerlas en práctica, sientan que mejoran los niveles de bienestar y calidad de vida de la persona mayor a la que cuidan y de la suya propia.

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c. Ex-Libris: Capítulos de libros, o libros completos. En el segundo caso la publicación se realizará por capítulos o secciones. d. Borradores de tesis (Pre-prints): Documentos no publicados por ningún medio, de investigaciones originales.

d. Reporte de caso: Estudio sobre una situación particular con el fin de dar a conocer las experiencias consideradas en un caso específico. Incluye una revisión sistemática comentada de la literatura sobre casos análogos.

e. Reseña bibliográfica: Comentarios no arbitrados de libros y revistas especializados.

f. Semblanza: Tiene como objetivo describir la relevancia académica y social de personalidades (quién y cómo es), relacionadas con el Trabajo Social en particular y las Ciencias Sociales en general.

4. La recepción de artículos se realizará durante todo el año.
5. Se aceptarán hasta un máximo de 5 autores por artículo a publicar.
6. Normas editoriales:
 - a. En la primera página, sólo aparecerá el título del trabajo, el cual debe ser explícito y recoger la esencia del trabajo. En la segunda página deberá incluirse: el título del trabajo en español e inglés, nombres y apellidos del autor o de los autores y sus afiliaciones académicas o profesionales. En la afiliación se indicará el nombre de la institución, ciudad, país, teléfono de contacto, correo electrónico y la identificación ORCID de cada autor. En la tercera página se incluirá un resumen del trabajo en idioma español e inglés, no superior a 250 palabras, indicando cinco palabras clave, en ambos idiomas, que mejor representen el contenido del artículo. Se recomienda el asesoramiento de especialistas para la redacción del resumen en idioma inglés. Al final del texto principal se consignarán los agradecimientos (nombres y afiliación institucional) y financiamientos (Institución financiadora y número del financiamiento).
 - b. La extensión de los artículos, versiones de tesis, y reportes de casos oscilará este entre 10 y 25 páginas (incluyendo títulos, resúmenes, referencias, figuras, tablas, apéndices e ilustraciones). Deberán estar escritos en letra Times New Roman, tamaño 12, a doble espacio, con márgenes de 3 cm y numeración en la parte superior derecha.
 - c. Las figuras, tablas e ilustraciones deberán presentarse en hojas separadas, indicando con precisión la página y el lugar en el cual deben ser insertadas en el texto, o si deben ser incluidas como anexos del trabajo. Las mismas deben estar numeradas correlativamente, tener un título descriptivo y estar citadas en el texto. Las abreviaturas y símbolos deben estar explicados al pie de la tabla. Los símbolos matemáticos deben ser claros y legibles. Los subíndices y superíndices deben estar correctamente ubicados.
 - d. Los encabezamientos de cada sección se escribirán en negritas a la izquierda y en minúscula.
 - e. La Bibliografía citada debe conservar el estilo autor-fecha, insertadas en el texto, por ejemplo: (González, 2004). Cuando la referencia se hace textualmente, el número de la página de donde se tomó debe ir inmediatamente después de la fecha, separado por dos puntos (González, 2004:24) o, si incluye varias páginas (González, 2004:2425) y en caso de varios autores (González et al., 2004:24). Lo no contemplado por estas normas, se guiará por el estilo de referencia de las normas APA.
 - f. Bibliografía citada al final del texto: La bibliografía debe limitarse únicamente a fuentes citadas en el trabajo y evitar referencias a obras no publicadas y citas textuales e innecesarias. Se ordenará alfabéticamente según el apellido de los autores. En caso de registrarse varias publicaciones de un mismo autor, éstas se ordenan cronológicamente, es decir, en el orden en que fueron publicadas. Cuando un mismo autor tiene más de una publicación en un mismo año, se mantiene el orden cronológico, diferenciándose las referencias de este mismo año utilizando letras (1996a). En todo caso las referencias deben ser registradas presentándose la información de rigor en el orden y de la manera siguiente:

- Libros: Apellidos, nombres, año de publicación entre paréntesis, título, lugar de publicación, casa editora, páginas. Castellano, Ana M. (2007). *Planificación popular y diálogo de saberes*. Maracaibo. Ediciones del Vice Rectorado Académico. Universidad del Zulia. pp. 166.
- Capítulos de libros: Apellidos, nombres, año de publicación entre paréntesis, título del capítulo entrecomillado, apellidos del editor o compilador, nombres del editor o compilador, título del libro, lugar de publicación, casa editora, páginas del capítulo. León U., José. (2010). "Salud y participación popular: hacia una ciudadanía plena". En Lévy, J. & Malo, M. *De la participación en salud a la construcción del poder popular: Experiencias para el debate*. Maracay: IAES pp. 17-30.
- Revistas Periódicas: Apellidos, nombres, año entre paréntesis, título entrecomillado, nombre de la revista, volumen, número, lugar de publicación, páginas que comprende el artículo. Pereira Jardim, Lourdes (2008). "Teoría Social y concepción del trabajo: Una mirada a los teóricos del siglo XIX". *Gaceta Laboral*. Vol. 14, No. 1. Maracaibo, Venezuela. pp. 81-101.
- Comunicaciones Personales: Esqueda-Torres, Luis S: Comunicación personal. - Resultados no publicados: Sánchez, Ligia M.: Resultados no publicados.
- Memorias de Congresos: Morales, Osiris: Programa de prevención integral en drogas como estrategia de intervención en las comunidades. pp. 99. Congreso de Trabajo Social –II Internacional y IV Nacional-. Maracaibo, Venezuela, 2000.
- En caso de usar las fuentes en Internet, debe mencionar el autor (de tenerlo), página web, día, mes, y año en que se efectuó la consulta. Hernández, Daniel R. La blogósfera cuenta con más de 60 mil blogs locales. En: http://www.eluniversal.com/2008/01/25/ccs_art_lablogosfera-cuenta_686549.shtml. Fecha de consulta: 04/02/09.

INTERACCIÓN Y PERSPECTIVA

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RULES FOR AUTHORS

1. Interaction and perspective. Journal of Social work belonging to the faculty of legal and political sciences will consider for publications original and unpublished research that have not been proposed simultaneously to other journals and whose purpose is to contribute to the knowledge in the area of Social work in any of their areas of action or in the field of social sciences or interdisciplinary nature in that area. Interdisciplinary is an achievement of the Journal.
2. The articles must be transliterated in Microsoft word office 2003 or a superior one, or Open office writer. A copy via electronic mail must be sent to the Publisher Committee of the journal at the following address: interaccionyperspectivarts@gmail.com. The proposals which the Publisher Committee consider potentially appropriate for publication shall be submitted to arbitration double blind, internal or external, by specialists in the theme. The comments in this regard should be submitted to the authors along with any suggestion of the Editorial Committee of the journal.
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 - e. Case report: study on a particular situation in order to know experiences considered in a specific case. It includes a commented systematic review of the literature about analogues cases.
 - f. Bibliographic notice: comments not refereed about books and magazines specialized.
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4. The reception of articles will take place throughout the year.
5. Normas standards:
 - a. On the first page only displayed the title of the research, which must be explicit and pick up the essence of the work. The second page must include: the title of the work in Spanish and English, the media, or short title (no more than 60 characters with spaces), names and surnames of the author or authors and their academic or professional affiliations. The Affiliation will indicate the name of the institution, city, country, phone contact, fax, postal address and e-mail. The third page will include a summary of the work in Spanish and English, not exceeding 250 words, language indicating five key words, in both languages, which best represent the content of the article. It is recommended the specialist advice for the drafting of the summary in English. At the end of the main text, acknowledgements (names and institutional affiliation) and financing (financial institution and number of funding) shall be entered.
 - b. The expansion of articles, versions of thesis, and case reports these will range between 10 and 40 pages (including titles, abstracts, references, figures, tables, appendices and illustrations). They must be written in Times New Roman, size 12, double-spaced, with margins of 3 cm and numbering in the upper right.
 - c. Figures, tables and illustrations must be submitted on separate sheets, indicating precisely the place where should be inserted in the text and the page, or if they should be included as annexes to the research. They should be numbered consecutively, have a descriptive title and be cited in the text. Abbreviations and symbols must be explained at the footnote in the table. Mathematical symbols must be clear and legible. The subscripts and superscripts should be correctly positioned.
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 - e. The cited bibliography must retain the style Author-Date inserted in the text, for example: (González, 2004.) When the reference is made textually, the number of the page where it was taken must be written immediately after the date, separated by a colon (González, 2004:24) or, if it includes several pages (González, 2004:24-25) in the case of several authors (González et al., 2004:24) It not covered by these rules, shall be guided by the standards reference style APA.
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- Books: Surnames, names, year of publication in parentheses, title, place of publication, publisher, pages. (Castellano, Ana M. (2007) *Planificación popular y diálogo de saberes*. Maracaibo. Ediciones del Vice Rectorado Académico. Universidad del Zulia. pp. 166).
 - Book Chapters: Surname, name, publication year in parentheses, the title of the chapter in inverted commas, surname of the editor or compiler, names of the editor or compiler, title of the book, place of publication, Publisher. (León U., José. (2010). "Salud y participación popular: hacia una ciudadanía plena". En Lévy, J. & Malo, M. *De la participación en salud a la construcción del poder popular: Experiencias para el debate*. Maracay: IAES pp.
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 - Congress memories: Morales, Osiris: Programa de prevención integral en drogas como estrategia de intervención en las comunidades. pp. 99. Congreso de Trabajo Social
-II Internacional y IV Nacional-. Maracaibo, Venezuela, 2000
 - In case of using sources on the Internet, you should mention the author, web page, day, month, and the year which consultation was made. Hernández, Daniel R. La blogósfera cuenta con más de 60 mil blogs locales. En: http://www.eluniversal.com/2008/01/25/ccs_art_lablogosfera-cuenta_686549.shtml. Consultation date: 04/02/09
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