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TARTALOM/CONTENT

EMPIRIKUS TANULMÁNYOK / EMPIRICAL STUDIES	5
Abdinassir, Nazira <i>Language use in Inter-Ethnic Marriages in Turkestan</i>	7
Aye, Su Hnin & Bocsi, Veronika <i>Internationalisation of Higher Education in Hungary</i>	19
Kissiya, Efilina & Biczó, Gábor <i>Luang Island: Coastal Ecology System in Outermost Small Islands (Escaosd), Maluku-Indonesia</i>	37
Maes, Fernanda Lucia <i>The Relationship Between Mass Media and Communication with the Process of the Dwelling of Hungarian Immigrants in the South of Brazil</i>	57
Mustapha, Mulikat Ladi A., Muhammed, Shuaib A., Tiamiyu, Kamoru A. & Okesina, Falilat A. <i>Parental Factors as Predictors of In-School Adolescents' Bullying Behaviors in Kwara State, Nigeria</i>	73
Szabó, Henriett <i>The Social Integration and Social Mobility: an Example from Hodász</i>	89
MÓDSZERTANI TANULMÁNYOK / METHODOLOGICAL STUDIES	99
Alshawabkeh, Maram Hani Falah <i>The Effectiveness of Ethical Leadership on Employee Performance: Systematic Literature Review</i>	101
Halili, Trime <i>How the Mass Media and the Public Discourse Affects Intentional Communities: an Ethnographic Study</i>	113
Madili, Meryem <i>Gnawa: Spiritual Sounds of Healing. Slavery, Rituals, Music</i>	127
Medojevic, Milena <i>Inexplicable Beings, Phenomena, and Events, Categorized as Mythological, Among the Peoples of the South Slavs: Collections of Folk Tales, Interviews with Storytellers and Mythological Beings in Modern Novels</i>	135
Meng, Liu <i>The Symbolic Field of the Memory Space in the Budapest Chinese-Hungarian Bilingual School</i>	149
Németh, Kinga <i>The Donkey Died, the Snake (Almost) Survived. Kuwaiti Folktales, what Happened to Hemarat Al Ghayla and Nesóp?</i>	159
Tamayo, Jose Antonio Lorenzo L. <i>Sayaw Ng Bati: A Perspective on Transculturation of the Spanish Colonial Heritage in the Southern Tagalog Region of the Philippines</i>	173
Tamásiné Dsupin, Borbála <i>Personality Development in Early Childhood Through Music Education</i>	189
Tran, Manh Kha <i>The Kafala System: Exploring Intersectionality in the Integration of Migrant Workers to the Labor Market in Jordan</i> .	197
MŰHELY/WORKSHOP	207
<i>Invitation to the Virtual Exhibitions of the Project „T.É.M.A.”</i>	209

EMPIRIKUS TANULMÁNYOK / EMPIRICAL STUDIES

LANGUAGE USE IN INTER-ETHNIC MARRIAGES IN TURKESTAN

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Abstract

The current paper intends to answer the following questions: What is the rule of the language use in the case of an interethnic marriage in Turkestan? What the features of sociocultural environment like and how these specificities make impact on the language use in interethnic marriages? Furthermore, what are the sociolinguistic aspect of the study concerning the interpretation if interethnic language use in mixed marriages? The whole research is based on a database which consists of 40 interviews.

Keywords: inter-ethnic marriage, language use, communication

Diszcipline: cultural antropology

Absztrakt

NYELVHASZNÁLAT AZ INTERETNIKUS HÁZASSÁGOKBAN TURKESZTÁNBAN

Jelen tanulmány a következő kérdésekre keresi a választ: Milyen szabályok érvényesülnek a nyelvhasználat vonatkozásában az interetnikus házassági kapcsolatokban Turkesztánban? Milyen hatást gyakorol a szociokulturális környezet a nyelvhasználatra? Továbbá, milyen szociolingvisztikai jelenségek figyelhetők meg a vegyes házasságok során detektálható nyelvhasználatban. A kutatás során 40 interjú került feldolgozásra.

Kulcsszavak: interetnikus házasságok, nyelvhasználat, kommunikáció

Disciplína: kulturális antropológia

Introduction

Marriage, as one of the main aspects of the socialization process, is the foundation that can preserve ethnic values and important factors in a form of religion, history, traditions, culture, language and etc., of each individual ethnic group. Pauwels (1985) in her work about the role of mixed marriages in language shift in the Dutch communities mentions the word exogamy in order to describe mixed marriage. Consequently, according to her, for many years the phenomenon of exogamy has been considered of interest mainly to sociologists and demographers. More recently, sociolinguistic attention has been drawn to the linguistic effects and consequences resulting from a mixed marriage. In point of fact, as the system that reflects the life history of each ethnic group, the language plays a special role. According to the author's database, 40 interviews, have been conducted in inter-ethnic marriages in Turkestan based on the structural key questions, there is the situation, and behind that, there is the matter of why it is possible in this location. This article is devoted to the peculiarities of the language used in mixed marriages in Turkestan, its meaning, and its features.

In a multicultural society, a speaker must be logical and critical in communicating with other people in order to be accepted in society. The speaker cannot speak freely without adapting to the mores, customs, and culture of society. Language is inextricably linked with culture. Language is an integral part of the culture as a whole and is a means of forming and transmitting other aspects of culture. The language that has been instilled in us since childhood allows us to establish, in addition to the system of communication, its types, and forms that we make (Nuryana, 2019). Consequently, sociolinguistic processes quite specifically tend to be highly perspectival and contextual (Fishman, 2008).

Moreover, in mixed marriages family members can be bilingual, mostly, multilingual. The mastery of two or more language-bilingualism or multilingualism is a special skill. Bilingualism and multilingualism are relative terms since individuals vary greatly in types and degrees of language proficiency (Encyclopedia Britannica, 1965). Two languages can be found in research spot community with inter-ethnic marriages, despite that from their social surroundings in a form of kindergarten, school, and higher educational system. A well-known fact, is that most basic cultural aspects are acquired unconsciously, simply by living in a certain society, and most of them are directly related to the language in one way or another. These statements are no different from the real life of interethnic marriages in Turkestan.

In my research, I strive to answer three basic questions that emerged during my period of fieldwork in Turkestan. First, what is the rule of language use, or in other words whose language is used mainly in the case of an interethnic marriage in Turkestan? Second, what are the features of the sociocultural environment like, and how do these specificities make an impact on the language used in interethnic marriages? Finally yet importantly, what are the sociolinguistic aspects of the study concerning the interpretation of interethnic language use in mixed marriages?

The theories of the study proposed by Pauwels (1965), Fishman (2008), Ualiyeva (2017), etc., as the main theory and supported by the culture, communication, history, and traditional system of local people of every research spot. The data in the research is taken from different types of mixed marriages, which are based on the main five priority ethnic groups: Kazakhs, Uzbeks, Russians, Azerbaijanis, and Turks with other ethnic communities. Data collecting includes several steps 1) collect information about the research spots that are designated and are the basis of the study, 2)

preparation of interview questions according to research requirements, 3) come to research settlements and familiarization with surroundings, 4) visit the administrative center of the village, get permission to work and create a list of families from research spot according to the plan, 5) interviewing with locals.

The topic

The topic of interethnic marriages affects two aspects that are of high importance in modern society: the transformation of the family institution and its role in the processes of socialization and integration of social subjects, as well as globalization trends in the field of interaction between ethnic groups and cultures, self-determination of national communities, the dynamics of ethnogeopolitical processes. Interethnic interaction in marriage with a spouse from another culture is directly related to the quality of the process of social (including demographic and spiritual) reproduction of societies.

It is impossible not to mention about the consequences of the Soviet Union on the entire territory of Kazakhstan. Within the framework of Soviet national policy, language was considered one of the most important components of national identity. Each national republic in the USSR had its own "national language", the teaching of which was officially encouraged through the creation of schools in the native language, the publication of textbooks and newspapers, and the creation of national elites. Nevertheless, in the republics, including Kazakhstan, people had good reasons to master Russian perfectly. In the history of Kazakhstan, Russian was the language of interethnic communication throughout the country, and in all national schools, without exception, it was taught as a second language. Russian opened up opportunities for higher education; it was impossible to make a career in governing bodies without fluency in Russian. The existence of a common

language contributed to the conclusion of interethnic marriages; it was in mixed families that Russian was most often spoken at home. In many purely German, Armenian, Korean and Tatar families, the main language of communication was also Russian (Ualijewa and Edgar 2012). Despite all these political processes that greatly influenced the language system in Kazakhstan, in the southern part of Kazakhstan, where our place of research is located, the status of the Kazakh language has always been the first place. Moreover, the traditional way of life ruled by the original Kazakh scale of values has been preserved at a high level. There were years that in educated Kazakh families, children sought to be educated in Russian in order to ensure their future in Soviet society. Not a small part of the generation that was brought up in this period still live in Turkestan.

In the post-Soviet period, the state attempted to revive Kazakh. Its role in education and the work process has increased, and knowledge of Kazakh is required from all employees of state bodies. In 1989, the law "On Languages in the Kazakh SSR" was adopted, which determined the status of the Kazakh and Russian languages. In it, in particular, it was said that "the state language of the Kazakh SSR is the Kazakh language", and the Russian language is "the language of interethnic communication". According to the 1995 constitution of Kazakhstan, Kazakh is the only state language. Nowadays, the Kazakh language status according to the law is the only state language (11).

The life of 20 types of mixed marriages in Turkestan which are based on various ethnic communities with 'priority' ethnic groups who are living in 4 determined different rural districts: Shornak, Hantagy, Zhana Iqan, Turkish settlement (Turki poselkasy) were analyzed. In order to be more comprehensible in the contemplation language use system in mixed marriages in Turkestan, collected data will be given in three groupings: (1) Language use in everyday life (2) Language of

communication with children (3) Language of communication with the spouse.

Framework of the structure on presenting collected research data

In accordance with the 40 interviews from 20 different mixed marriage families that were collected during the research period following facts were designated: In every research settlement, most parts of the inhabitants use the Kazakh language in everyday life. Albeit, most speakers of the Kazakh language are living in Shornak, in relation to all rural districts, then 70% of Russian language users were living in Hantagy (Picture1.).

Other villages were using several languages, mostly in relation to spouses, despite the fact, the main inhabitants speaking the Kazakh language. Turk language speaker’s datum-line is based on Turkish settlement, in this reason, in the presented research, the framework of speaking in inter-ethnic marriages in the Kazakh language will be

performed with Shornak rural district, the basic occasion of Russian language speakers was proposed in the case of Hantagy. Zhana Iqan's case study was given with the results of research data on language use with children, by analyzing and including all the clues from Shornak, Hantagy, and Turkish settlements.

The main reason for the result of speaking with children in the Kazakh language – is related to the ‘Kazakhization’ process in the whole of Kazakhstan, especially the young generation welcomed mostly with the knowledge of the Kazakh language by having advantages on all levels of education and employment system (Encyclopedia of South Kazakhstan, 2005). Furthermore, the basic cause of using several languages in communication with a spouse, differs from language relation with the child and completely family language of connection – firstly, the effect of historical doings, secondly, the difference in age, living in various periods of life.

Picture 1. *Kazakhstan*. Source: https://www.neweurasia.info/archive/wb_is_wb/47.html



Language use in everyday life in mixed marriages in Turkestan

Description of the Shornak

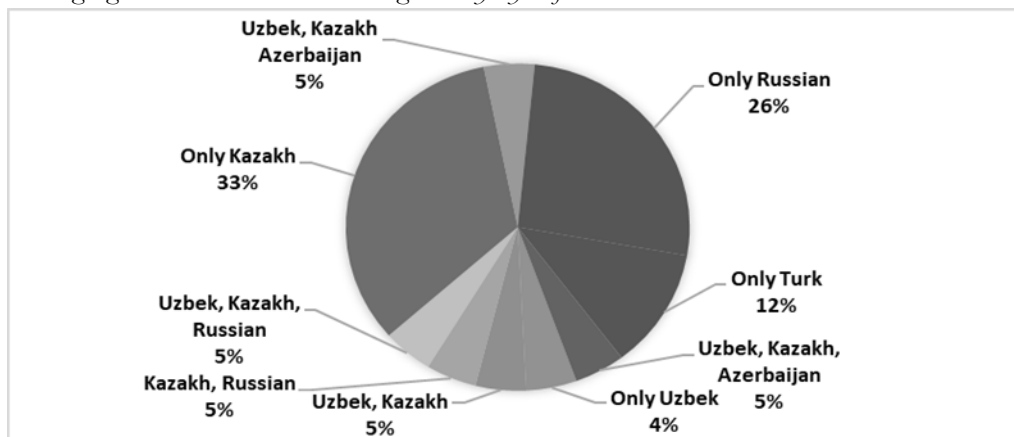
The village of the Turkestan city administration, the managerial center of the Sauran region, and the Shornak rural district, which is located 22 km northwest of the city of Turkestan along the Arys-Turkestan canal. The population is 2.5 thousand people (2003). One of the fundamental areas of the Turkestan region from the agricultural and industrial point of view, is the processing spot of the Turkestan cotton ginning plant, the location of the grain receiving institution. Furthermore, farms were organized on the ground. In accordance with mentioned facts, Shornak citizens are mostly agronomies and a huge part of cotton and vegetables in the South part of Kazakhstan are prepared in this rural district.

According to the village passport for the last year: The total number of inhabitants is 13184, from them: Kazakhs – 5978, Uzbeks – 7156, and other nations – 25. Consequently, other information about the sociocultural environment is obedience to most interviewers, generally of them were born in Shornak and from that period and currently living in this village. The majority were Kazakhs and Uzbeks before, however presently

most people are Kazakhs. In the past, there were many Russians in order to work in the agriculture system of the region, however, presently no one from the Russian ethnic group lives there practically. Everyone in the village is deeply friendly and ready to respect each other at any time. Commonly, they never divided into unequal ethnic groups and tried to keep peaceful unity, especially on national holidays. Additionally, people are hardworking; neighbors are always open and ready to help, incremental that is the principal symbol of hospitality which are especially, paid attention among locals.

The Figure1. illustrates the number of inhabitants of the research spot in language using daily life. In general, it can be seen that most of the speakers use only the Kazakh language 44%, which means 14 interviewees and the largest part of the speakers is occupied by speakers only of Russian 26%, equal to 11 speakers. And the next more common language is Turkish which is drawn up 12%. The least spoken languages make up about 27% - 5 users. In detail, only Kazakh language users mostly lived in the villages: 9 inhabitants from a cumulative amount living in Shornak, 4 occupants of the total number of speakers accounted for Hantagy village. Consequently, only one of them related to Zhana Iqan.

Figure 1. Language use in Inter-Ethnic Marriages Everyday Life. Source. Author.



Basis of speaking in the Kazakh language various inter-ethnic marriages in Shornak

Most citizens of Shornak consider if you are living in the Republic of Kazakhstan, Kazakh nation's mother language is mandatory to be spoken by everyone, except being from another nationality; who commonly prefer to speak the Kazakh language because of the future of their child that indicates several aim aspects: firstly, mandatory state exam after graduating from school in mother language, secondly, the awareness of Kazakh language gives more opportunity to win a scholarship from government and find employment. Furthermore, in accordance with the general position of locals, respecting Kazakh national values is the duty of a citizen of every person who lives in this country.

Language communication with children

Description of the Hantagy

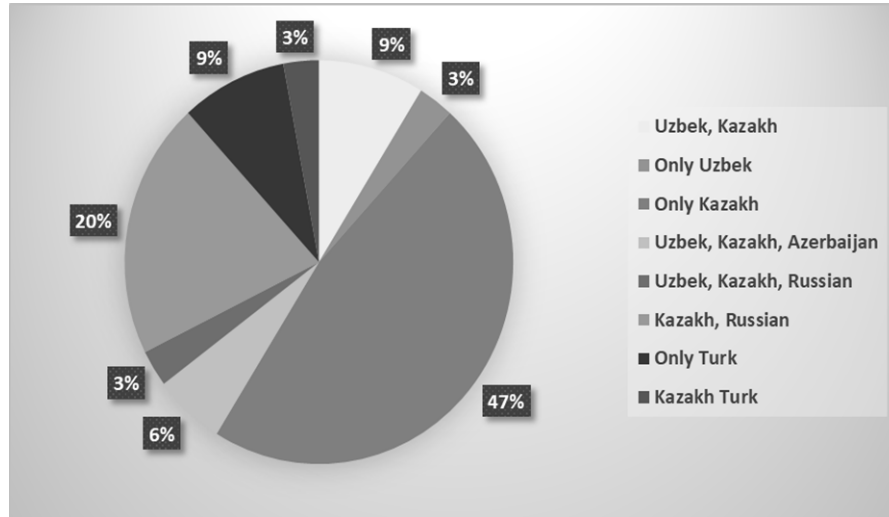
Settlement of the Kentau city administration, the center of the urban district. The Hantagy is located on the southern slope of Karatau, at the mouth of the Biresek River, 6 km east of the city of Kentau. The Hantagy received the status of a village in 2009. According to the passport of the rural district, in the Hantagy, scientists are studying a settlement inhabited by people 3,000 years ago. During the years of collectivization, the Kyzylkorgan, Almalyk teams, and the Kauchukons mine were created and engaged in the cultivation of focuses. The mining and processing plant in Hantagy 1935-65 belonged to the Myrgalymysaysky reserves of lead-zinc ores that supplied the lead plant in Shymkent with raw materials. During the Soviet Union, the majority of the population of the village were miners and residents who worked at CHPP (ТЭЦ -Thermal power plant) No. 5 and other production centers located in Kentau, which is, located 7.5 kilometers from the city. By the population, the total number of inhabitants in

Hantagy – is 6364 (I2). Information by ethnic groups in accordance with the passport of the rural district: Kazakhs - 5708, Russians – 150, Uzbeks – 362, Azerbaijanis – 102, Tatars – 32, Chechens – 8, Koreans -2.

In obedience to the interviewers, several basic aspects of the sociocultural environment necessary to be mentioned by the author. Most villagers who live in this research spot were born in Hantagy and in the neighborhood of this village. Besides, interviewed people were between 45-70 years old, according to them; they were growing up among Azerbaijan, Uzbeks, Tatars, Russians, Greeks, and Chechens. Even named ethnic communities were the majority in some periods of the historical phenomenon, when Kazakhs at that moment were minorities in their homeland. Notwithstanding, nowadays Kazakhs are the majority part of citizens. Even when there were moments at school when Kazakhs were only two people in one class at school. As locals mentioned, all representatives of various nationalities, primarily, came to work in the mine, and the main part that people preferred to stay for life and spend the rest of life in this research spot. Nevertheless, primarily part came back to their hometown. Main facts about the sociocultural surroundings of Hantagy in accordance with interviewers: local people are very hospitable; morality is in the first place; social surroundings are peaceful and respectful; people are quite simple and always open; neighbors are mostly open and helpful. Even after several years they never knocked on the door and windows also stayed open every time; people never divided into different ethnic groups. However, before the village was highly rich in agricultural system and locals were hard-working, however now most inhabitants became modern.

Figure 2. indicates the number of children speaking the language in Turkestan region's research settlements in percentage while the table indicates the number of persons numerically.

Figure 2. Language of communication with children in Turkestan region. Source. Author



Overall, it is evident that the vast majority of children speak only the Kazakh language, total percentage – 47%, which means 16 speakers from all. Consequently, the second largest part of the diagram constitutes are children who speak Russian and Kazakh at the same time – 20%, which is equal to seven people from the total number of users. The following languages, which are equally extended among the inhabitants, were Turkic and Kazakh-Uzbek at the same time; they draw up 9% of all, which is identical to only three persons. Only Kazakh language speakers were presented in the next rural districts: Zhana Iqan – 3, Shornak – 8, Turkish Settlement -3, Hantagy – 2.

Basis of speaking in the Russian language in inter-ethnic marriages in Hantagy

Most Russian speakers in this village were people of Russian nationality whose parents were Russians who came to work in the mine. In the family Russian language was spoken from their childhood. All representatives of different ethnic groups could

interpret with each other and could be contacted only in the Russian language in the last century. However, nowadays new generation speaks the Kazakh language, and most people who were interviewed noticed, it is not easy immediately switch to the Kazakh language in every aspect of life, nevertheless, they are trying to meet the new requirements of the current generation and the social sphere.

Kazakh-Russian speaking with child families

Kazakh-Russian language speakers performed from the next villages: Hantagy – 5, Shornak – 2, Hantagy. Most Russian speakers in this village were people of Russian nationality whose parents were Russians who came to work in the mine. In the family Russian language was spoken from their childhood. All representatives of different ethnic groups could interpret with each other and could contact only in the Russian language last century. However, nowadays new generation speaks the Kazakh language, and most people who were

interviewed (between ages 45-70) noticed, it is not easy immediately switch to the Kazakh language in every aspect of life, nevertheless, they are trying to meet the new requirements of the current generation and the social sphere. That fact, the parents are Russian and speak in Russian language, decided to give their child to Kazakh schools it affected highly to the children to befriend mostly Kazakhs and speak Kazakh, even from a Russian-Russian family, who has 2 daughters and a son, daughters were married to Kazakh man and so has a girl-friend who is Kazakh as well. Even the daughter became a Muslim in her new family. From a Kazakh-Russian family, whose wife is Russian and was born in Turkestan, because of the mother's studying in a Russian language school and growing up among Kazakhs, and Russians, the child can also speak in the mother's language sometimes. Primarily, Kazakh is dominant. Language communication with spouse.

Description of Zhana Iqan

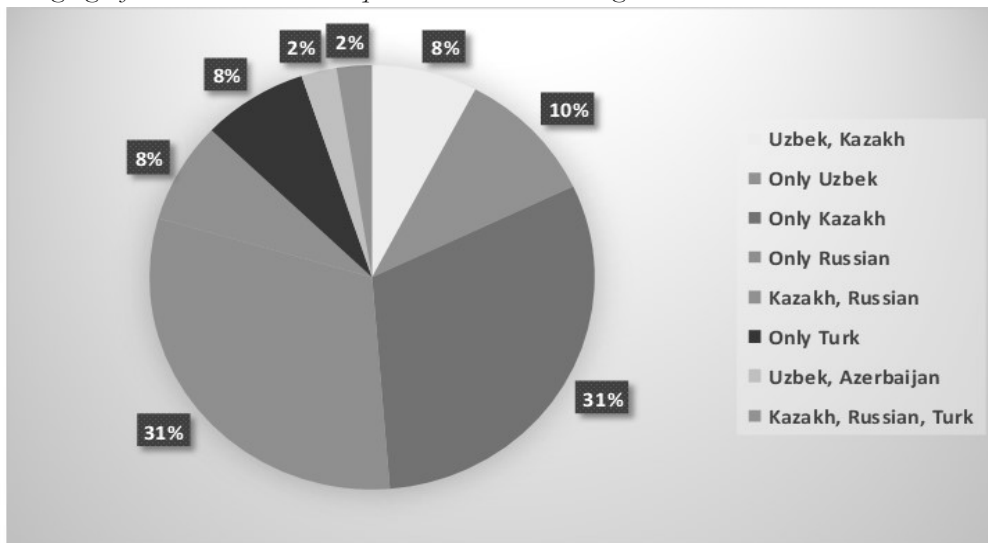
The village is located in the Turkestan region, Sauran district that is border in the north with the city of Kent, in the south, with the rural district Eski (Old) Iqan, in the west with the lands of the city of Turkestan in the Baidibek region. 50 km from the center of the Turkestan region. The village was inhabited mostly by shepherds and seasonal workers. Iqan takes a special place in the historical period of Kazakhstan, which should be taken into account especially. The historical reason for the name Iqan was related to the common name for two monuments of the Middle Ages. The first Iqan is located in the center of the Iqan district of the city of Turkestan which covers 10-15 centuries. After a long time named area has turned into a hill. There is no exact data on when Iqan was founded. Hafiz Tynysh in his work "Abdollanama" says that the Bukhara Khan Abdolla stopped in Iqan in 1582, when he went on a campaign against

the Tashkent ruler Baba Sultan. In the middle Ages, Iqan played a very important role in the cities of the Turkestan region. The majority part of the medieval historic city was destroyed by the establishment of new modern buildings. Total number population – 7810, from them Kazakhs – 1064, Uzbeks – 6505, Tatars -17, Uyghurs -5, Azerbaijani – 1, Russians – 2, others – 2.

According to the word of inhabitants of Zhana Iqan, the most mentioned facts are, most resemble other research settlements: local people never divided themselves into various ethnicities and always live in a friendly, peaceful, and helpful to each other atmosphere. In general, a vast amount of dwellers respect and like Kazakh customs and feel themselves as Kazakhs in everyday life, additionally in national holidays celebrates and fulfilling every requirement of the social norms in an equal position with Kazakh nationality; Commonly, families living here are big, and the average number of children in one family is 5. Therefore, mostly part of people is following to their ancestor's traditional steps of holding an agricultural system and keeping a gardening whole system in every private house. Locals prefer to keep peaceful unity, especially on national holidays. However, the young generation started to be more separate from any other ethnic groups.

Given figure 3. presents the language of communications with spouses in the Turkestan region's rural districts. In detail, there is an interesting fact, that only Kazakh and only Russian language users' amounts were equal to 31 % of both of them. This indicator is identical to 12 speakers each of language. Reason speaking only in Kazakh mentioned above. Commonly prefer to speak in the Kazakh language because of the future of their child. When the child will finish school, it will be mandatory to pass a state exam, in order to win a scholarship from the government and find a good job; Zhana Iqan is commonly a Kazakh-Uzbek, a Russian kind of user at an equal level.

Figure 3. Language of communication with a spouse in the Turkestan region's rural districts. Source: Author.



Samples from mixed-marriage families

Uzbek-Azerbaijan family, she was born in an Azerbaijan family. The majority of nationalities in her hometown were Kazakhs, Russians, and Azerbaijanis were a minority. When she studied at school, her classmates were mostly Kazakhs, Uzbeks, Russians, and Koreans and mostly they spoke in the Kazakh language. Relations between dissimilar ethnic communities were friendly. Mostly they followed Kazakh culture; From the Uzbek-Uzbek family, the wife was born in Uzbek and simply had many child families. The majority were Kazakhs and Uzbeks, and other ethnic groups as well but she never was in close relation with them. The husband was born in an Uzbek teacher family and his ethnical surrounding were Uzbeks. Kazakhs and Uzbeks divide nations from each other kind of prohibited topic that to is discussed. According to him, despite being from different nations they are always was as one peaceful unity. The basis of speaking in the Kazakh language with children in research settlements including Zhana Iqan is excepting the fact by locals, that despite

being a representative of another ethnic society, locals always try to be in a process of 'Kazakhization' and to raise such children who will become like 'pure' Kazakhs.

Moreover, to communicate with Kazakh children at school easily and in the future at universities, because the future of a child is strictly connected with the Kazakh language. Most citizens of Zhana Iqan agree with local Kazakhs who consider, if you are living in the Republic of Kazakhstan, Kazakh nation's mother language is mandatory to be spoken by everyone, in this way they could show how they are thankful to that nation who welcomed them from historical complicated periods.

Only Russian language users communicate with their spouse

Zhana Iqan -2, Sayram -2, Hantagy – 8, as mentioned above, most Russian speakers in Hantagy were people of Russian nationality whose parents were Russians who came to work in the mine. In their family, the Russian language was

spoken from their childhood. All representatives of distinct ethnic groups could interpret with each other and could contact only in the Russian language in the last century. However, nowadays-new generation speaks the Kazakh language and most people who are interviewed from the Russian language village are ready to meet the new requirements of the current generation and the social sphere. Nevertheless, in Zhana Iqan, locals are intercultural; several languages remain at the equal level of speaking, nevertheless, at the same time, trying to follow the Kazakh social norms and customs.

Description of Turki poselkasy (Turkish settlement)

This village, which has another name “Bekzat”, is situated in the Turkestan region between Shornak and Zhana Iqan rural districts. Turki poselkasy, the name given by local people from the historical period, reason that there lived only Turks. This research spots the sociocultural environment and values of Turkish people maintained at a high level in comparison with other research villages. Another name for these people is Ahysk Turks. Chairman of the World Association of Turks-Ahysk Ziyatdin Kasanov emphasized that despite the expulsion, the Ahysk Turks never lost their language, religion, customs, and traditions. Moreover, about that the Ahysk Turks are hard-working and earn money by the sweat of their brow. Turkey provides them with all possible support both at home and abroad. According to the head of the association, they were deported from their historical lands, from Georgia, because of their belonging to the Turkic nation. Today Armenians live on their historical lands. The deportation of the Ahysk Turks to Central Asia was carried out by the order of Stalin on November 14, 1944 (13). Total population of Turki poselkasy – 2405. By ethnic groups: Turks – 2350, Kazakhs - 49, Uzbeks – 6.

In accordance with the database of authors collected during interviews all representatives of Turk language users, which is equal to 12 % in relation to all research settlements in inter-ethnic marriages living in this spot. From this data, language communication with children illustrates 9 % while language interaction with spouse demonstrate 8%. The majority part of interviewers mentioned that, despite supporting maintaining their ethnic values, at the same time a new generation is ready to encourage Kazakh and Russian languages.

Conclusion

The southern part of Kazakhstan, which was situated in basic research communities, is the most maintain place of Kazakh national values. Despite all these political processes that greatly influenced the language system in Kazakhstan, in the southern part of Kazakhstan, where our place of research, the status of the Kazakh language has always been the first place. In accordance with the 40 interviews, collected during the research period with mixed-marriage families in Turkestan, the following facts were designated in language use: In every research settlement, most parts of the inhabitants use the Kazakh language in everyday life. Most parts of Russian language users resided in one village, Hantagy. Half part of the other villages was multilingual, mostly in relation to the spouse, despite the fact, the main inhabitants spoke the Kazakh language. Turk language speakers were based on Turkish settlement only. Local people of every research settlement, by whole the mentality, style of everyday life, and sociocultural environment of residents resembling to each other. The main cause for this is that Kazakhstan was their homeland during grave periods of representatives from various ethnic societies. They are considered Kazakhstan as their hometown and all the valuable aspects of this country are needed to be their nationwide accomplishments as well. Additionally,

that is the main cause of using the Kazakh language in inter-ethnic marriages, especially using the Kazakh language in the upbringing of the young generation, in communication with the spouse. The basic reason for being multilingual in the relationship between spouses is age groups and living in different periods of the country.

As an example, from Kazakh-Tajik family mentions, the Kazakh language is always dominant because of being the mother tongue of the husband. In this family, the man is always commanding, which is why children will mostly follow the father. Additionally, speaking in Uzbek and Tajik languages is ridiculous for the child. In the Kazakh-Russian family, because the husband is Kazakh, all family members should speak the Kazakh language. He considers, if the mother language will die it means that the whole nation can be disappeared. That is why, he is not only inside of a family, even calls other his friends, and relatives to speak in the Kazakh language. From the Kazakh-Azerbaijan family, this is the fact, that everything was agreed upon before the marriage. After the marriage, the family will be spoken only Kazakh language child. In the Kazakh-Uzbek family, the Kazakh language and all Kazakh national values were in the first place. Every rule in the family was agreed upon before the marriage. As a mentioned wife, Uzbek, and Kazakh social norms mostly look like each other and there can be some differences only in the marriage system traditions and celebrations. From the Russian-Uzbek family in Hantagy, take cognizance of that fact, if in the family what nationality will be man, then all the rules and family type adjusts to his national values. From the Russian-Tatar family, some interesting occasion was founded, the husband is Russian and he saved all the national values and features of his nation. However, the wife despite speaking in Russian followed the local Kazakh social norms and consequently, received Islam and tries to preserve Kazakh national values in the family simultaneously with

the husband's nations' prefer. She was born in Karaganda. Grew up among Kazakhs and Russians in the big Tatar family. They came from Russia in order to work in the mine. The minority were Koreans, Mordovia, Tatars, Germans, and Chinese. In the third Russian-Uzbek family, whose nationality of husband was Uzbek, could be founded some case studies, that despite being the dominant man in the family, this couple speak in Russian. The reason for this, when he was born in this village majority were Russians, Azerbaijanis, and Tatars, even Kazakhs were less amount from them in that years. His parents left him when he was born and a local grandmother whose nationality was Russian brought him up.

To sum up all the highlighted aspects of diver inter-ethnic families, two fundamental principles can emerge: primarily, the role of the man in the family and its effect on making decisions in every dimension of lifestyle, which will be the basis for the analysis in the following articles. Secondly, the majority part of representatives of various ethnic groups respects deeply the Kazakh nationality, besides it, assimilating with Kazakh people at a sufficient level they perceive the most ground part of Kazakh sociocultural values as equal to theirs.

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INTERNATIONALISATION OF HIGHER EDUCATION IN HUNGARY

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Abstract

The most important aim of this study is to give a brief overview on the internationalisation of the Hungarian higher education system. The European policies and programmes that are significant in the internationalisation of Hungarian higher education will be explained herein. The national agency for internationalisation and its programmes with a special emphasis on its flagship programme, the Stipendium Hungaricum Scholarship programme will be described. With the help of statistical databases from the Education Office, and Tempus Public Foundation (TPF), significant trends will be analysed based on the most updated data in the field of incoming and outgoing student mobility. We will also use the Hungarian subsample (N= 7547) from the Eurostudent VII database, and discuss study mobility experiences of both domestic and international students from several aspects; demographics, transition and access, types and modes of study and socio-economic background. We will also provide international comparison from some aspects. Our findings confirm the results about the unbalanced nature of inbound and outbound mobility and the existing differences in the field of access.

Keywords: higher education, internationalisation, students

Discipline: sociology, education

Absztrakt

A MAGYAR FELSOŐOKTATÁS NEMZETKÖZIESEDÉSE

A tanulmány célja, hogy átfogó módon mutassa be a magyar felsőoktatási rendszer nemzetköziesedésének folyamatát. A jelenség alaposabb megértéséhez az európai oktatási célkitűzéseket és programokat tekintjük át a tanulmány első részében, majd ezeknek a területeknek a magyar aspektusait is megvizsgáljuk – különös tekintettel a Stipendium Hungaricum ösztöndíj programra. A nemzetköziesedés legfontosabb trendjeit az Oktatási Hivatal és a Tempus Közalapítvány statisztikai adataival illusztráljuk – kitérve a mobilitás mindkét irányára. Az Eurostudent VII. adatbázis magyarországi almintájának segítségével (N = 7547) áttekintjük a hallgatók mobilitási tapasztalatait a demográfiai jellemzőik, a felsőoktatásba való bekezdésük körülményeik, a tudományterületük, képzési szintjük és más háttérváltozók mentén. Bizonyos vizsgált területek esetén a magyar adatokat nemzetközi összehasonlításban vizsgáljuk meg. Eredményeink megerősítik, hogy a kimenő és a bejövő mobilitás trendjei nem illeszkednek egymáshoz, illetve a mobilitáshoz való hozzáférés beágyazott az egyenlőtlenségekbe.

Kulcsszavak: felsőoktatás, nemzetköziesedés, hallgatók

Diszciplínák: szociológia, pedagógia

Introduction

Internationalisation, which can be considered a proactive response to the globalized world (Knight, 1999), is a global phenomenon that affects various aspects of higher education in countries all around the world. Its meaning is different from region to region, institution to institution. Scholars have defined this new concept in different ways, including De Wit and Hunter (2015a, p. 27) who stated; “the intentional process of integrating an international, intercultural or global dimension into the purpose, functions and delivery of post-secondary education, in order to enhance the quality of education and research for all students and staff, and to make a meaningful contribution to society”. Although the definition of internationalisation” is different from scholar to scholar, no one can deny that it evolves over time, incorporating new forms, dimensions, and approaches.

Knight (1999) suggested four separate approaches to internationalisation with special emphasis on the fact that they do not contradict but complement each other. These are the activity-, the competency-, the ethos- and the process approaches. The first approach tends to describe internationalisation

dimensions in terms of specific activities and programmes such as international students, student/faculty exchange, technical assistance, and curriculum. The second approach emphasized the development of international competencies of the academic community- students, staff and faculty. The focus of the third approach is encouraging and fostering the development of international and intercultural values and initiatives in an institution, and the last one, the process approach, however, stresses to integrate international dimension into teaching, research and service by incorporating a broad array of activities, procedures and policies (Knight, 1999). Furthermore, multifaceted dimensions of internationalisation include mobility, export of academic systems and cultures, research cooperation, knowledge transfer and capacity building, student and staff exchange, internationalisation of the curriculum and of learning outcomes, cross-border delivery of programmes, projects and institutions, and virtual mobility (De Wit & Hunter, 2015b).

Among these dimensions, the international mobility of students, staff, and researchers, as well as exchange programmes is the most visible aspect

of internationalisation in higher education around the world, including in Europe, and the same is true for the internationalisation of higher education in Hungary. And hence, this paper will highlight the incoming and outgoing mobility of Hungarian higher education in the later sessions.

A Brief Overview of Internationalisation of Hungarian Higher Education

The situation of Hungary seems to be specific from a lot of aspects. Hungary belongs to the post-socialist countries and this element shapes the current characteristic of institutions. Before the fall of the Communist regime, universities and colleges were massively separated from international networks, scientific space and scientific paradigms, and those activities which refer to internationalisation were limited to the Communist bloc. In the 90s this situation naturally changed, but every actor (students, lecturers, staff, management etc.) had their barriers and lags – especially in the field of language-learning (Dabney-Fekete, 2020). Deficiencies in the field of foreign language skills is typical in Hungary if we compare the data with most of the European countries (I1). During the transformation and the expansion after the Millennium, the process of differentiation became typical and the “lower segment” of institutions hardly got involved in the progress of internationalisation (Rédey, 2009). The higher level of internationalisation was typical at first in medical courses (Derényi, 2018). The situation of Hungary is specific due to another important fact – there are Hungarian minorities in the neighbouring countries – a significant part of the ‘international’ students’ body belongs to this group. Students, lecturers, and staff during their ongoing mobility can use the Hungarian language, as well. Universities have a mixed character from the aspect of working method: the competitiveness and market-oriented method (which also connect with the participation

in the international educational space) and their state-controlled nature (which may affect the process in a negative way). Some elements can push institutions toward the higher level of internationalisation, – e.g. the position in university rankings (e.g. QS World University Rankings, I2) or financial motives (Derényi, 2018). During the 2010s the expansion seems to have stopped at the Hungarian universities for various reasons – the number of the young cohort decreased and the educational policy was described with rather restrictive intentions. The higher proportion of incoming students may counterbalance this negative trend. The working conditions of academic staff is analysed by several authors (Neave, 2009; Fairweather, 2009; Henkel, 2010) and this profession can be described as a balancing among different fields (teaching, research, administration, management) and increasing workloads. The patterns of this balancing are shaped by the prestige of the institutions, gender, disciplines and a lot of other factors. Participating in a foreign scholarship or improving the level of language efficiency requires effort and time – and in some segments of higher education these resources are limited (e.g., in the case of the higher number of student population or high number of teaching lessons). Furthermore, students’ participation in internalization is embedded in individual and social circumstances alike. We can analyse the opportunities of students from the aspect of inequalities (economic capital or language proficiency), and some scholars have highlighted that we can use the notion of “mobility capital” whose extent is different in each social group (Dusa, 2016; 2020).

To sum up the features of Hungary, Polónyi (2022) stated that the level of internationalisation is in the middle of the Central European Countries. The rate of incoming mobility was increased in the 2010s, but this change concerns the students’ body and not the academic staff. The educational policy supports rather the incoming and not the outgoing

mobility - especially in the case of short term outgoing mobility.

European Policies and Programmes

The European programmes and policies initiated by the European Commission have been very influential in the transformation of higher education and internationalisation of higher education institutions. Here two major initiatives are highlighted: the Bologna process and the Erasmus programme. The Bologna process, which began in 1999, has brought about unprecedented changes in the European higher education arena and played a fundamental role in the emergence of the European Higher Education Area (EHEA), the European Research Area (ERA), as well as the growth of student, staff, and research mobility across Europe. Hungary signed the Bologna Declaration with 28 other EU countries and transformed the Hungarian higher education system based on the objectives set in Bologna (Derényi, n.d.).

For Hungary, Bologna has rendered significant changes to the higher education system, first of which was the introduction of multi-cycle degree programmes through legislative measures which were prepared and implemented in 2003, and thus the complete three-cycle structure came into existence in 2010 (Pusztai & Szabó, 2008). Concurrently, the Bologna tools for mobility and recognition, such as the Diploma Supplement, credit transfer and the accumulation system, were also introduced which promote both inward and outward mobility.

Other aspects of the restructuring include the formation of new committees and organizations, the formulation of new policies, the integration/separation of study programmes, faculties, and higher education institutions, as well as the institution management. Bologna added dramatic changes to the reforms in higher education that

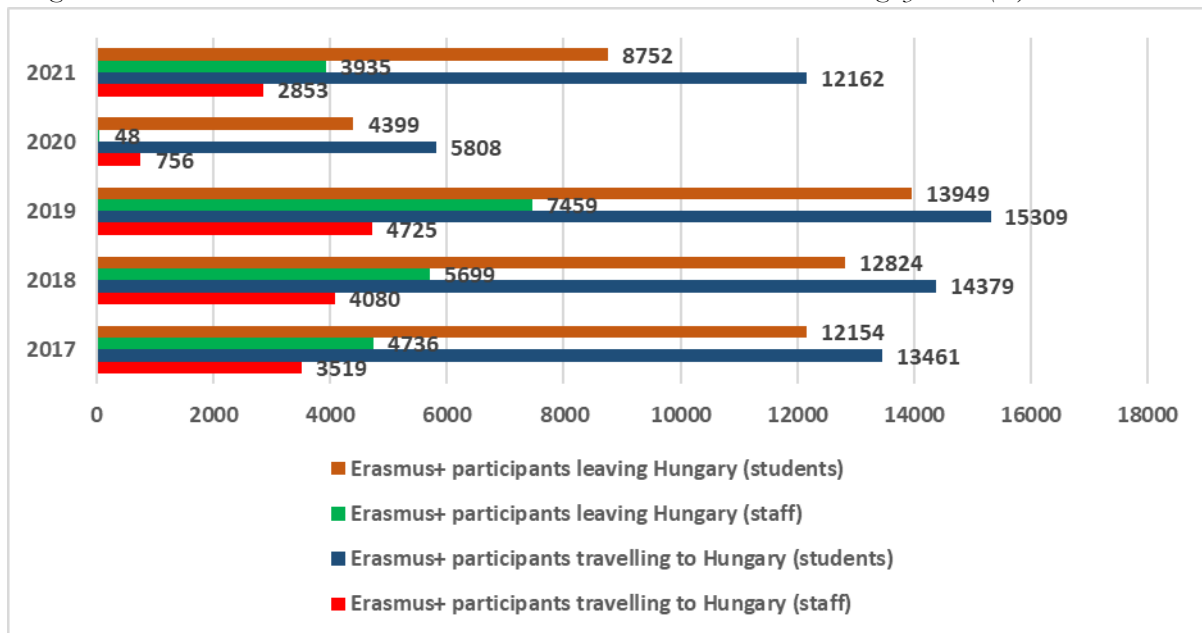
had already started before 1990 and hence the years following 1990 are regarded as the longest decades of Hungarian higher education (Fábri, 2000), or the massive reforming period in higher education. After two decades, it is apparent that Hungary has successfully achieved the Bologna goals. One evidence proving the attractiveness of Hungarian higher education institutions is the double increase in the percentage of international students between 2010 and 2017 (OECD, 2019).

The European Union and its motility programmes have played an enormous role in triggering international mobility on an unprecedented scale across Europe and beyond Europe.

One of the most successful programmes is the Erasmus Programme, which was launched in 1987 as an exchange programme for students in higher education and later evolved into Erasmus+. Over the past three decades, 9 million people across the world have benefited from the opportunities given by Erasmus to study, train, volunteer, or gain professional experience abroad (3). Hungary joined the Erasmus joint programmes in the late 1990s but only a limited number of higher education institutions participated as Hungary's transformation of the three-degree cycles had not fully been completed at that time. However, the participation is getting intense in the first phase of Erasmus+ programmes. Currently, 49 out of 63 higher education institutions are participating in Erasmus+ (14).

Most of these institutions (25) are in Budapest. In 2021, Hungary had 345 mobility projects in all sectors in which Vocational Education and training sector has the largest projects (126), followed by the youth sector (84), school education (63), higher education (50), adult education (12), sport (8), Jean Monnet and Cross sector (1) for each (15). During the period from 2017 to 2021, the total mobility of staff and students for both inbound and outbound mobility was more than 150,000 (Figure 1).

Figure 1. Erasmus+ in numbers 2017-2021. Source: Erasmus+, Erasmus+ in Hungary 2021 (15)



National Agency and its programmes for internationalisation

Since the beginning of the Bologna process, the Hungarian Government has consistently emphasized promoting the internationalisation of higher education institutions, as one of the ultimate goals of the Bologna is to promote international mobility. This is reflected in the government's actions in establishing the national agency, Tempus Public Foundation (TPF) in 1996 and the government's new Higher education strategy (2014) that set the internationalisation goals of higher education. TPF has been a key player in promoting international cooperation and mobility, modernizing, and enhancing the quality of education, training and human resource development while strengthening the European features of these areas. One of the major responsibilities of the foundation is managing several international mobility and grants and these international mobility programmes including Erasmus+, CEEPUS, Bilateral scholarship

programmes, Stipendium Hungaricum Scholarship programmes, Hungarian Diaspora Scholarship programmes, and the Campus Mundi programme. It also serves as a knowledge centre providing information on education and training policies, supporting guidelines for international students, teachers, and researchers through digital platforms, organizing thematic conferences, training courses, and joint actions with partner organizations, implementing EU 2020 related projects.

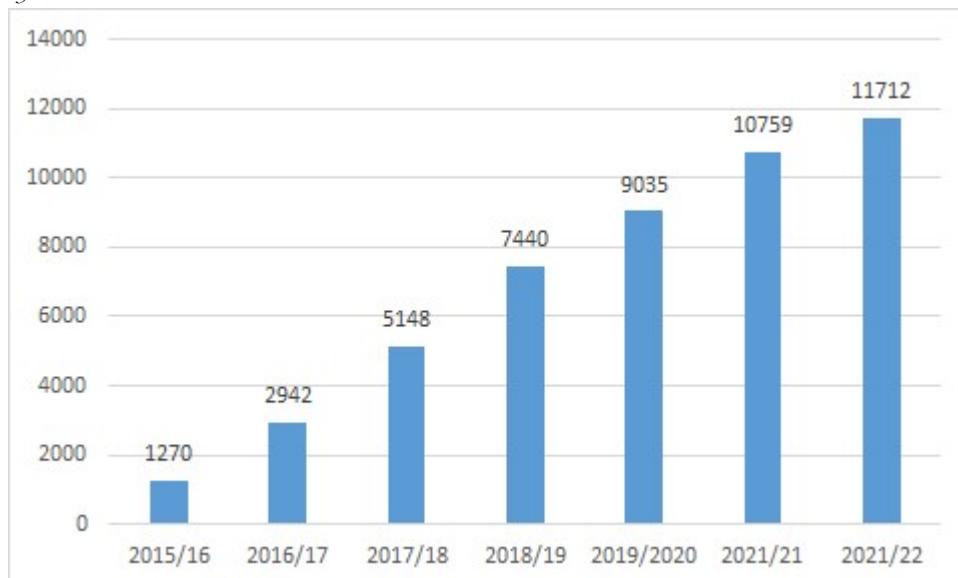
Besides, it manages research studies, dissemination materials and best practice publications (OECD/EU, 2017). It also strove to promote cooperation between foreign institutions and Hungarian partners and to enhance the international visibility of Hungarian Higher Education through active participation in international activities (Kovacs & Tweneboah, 2020). It plays an active role in the European Commission - funded dissemination projects, and in the implementation of the Lisbon Strategy.

Among the national programmes under the Tempus Public Foundation, the Stipendium Hungaricum is the most successful one. The government launched the Stipendium Hungaricum Scholarship Programme with the aim of supporting the internationalisation of Hungarian higher education and its constant development, strengthening the international relations of the academic and research community, and promoting the good reputation and competitiveness of Hungarian higher education throughout the world. The initiative supports inbound diploma and credit seeking international students with tuition free education, a monthly stipend, accommodation contribution and medical insurance. The geographical scope of the programme is enlarging year after year; it increased from 35 sending countries in 2015 to nearly 90 countries and territories from five continents up to now (16). Applicants are admitted to 28 highly prestigious

Hungarian higher education institutions, which offer over 600 full-time and non-degree English programmes in all higher education fields and at all degree levels, including part-time and doctoral programmes. Currently, there are around 12,000 international students studying within the framework of the Stipendium Hungaricum Scholarship programme (Figure 2.). It is obvious that the programme brings the prestige and international visibility of Hungarian higher education year after year as it received more than 52,000 applicants for 2022/2023 academic year which increased nearly 45% compared to 2020/2021.

Among 28 Hungarian higher education institutions, the top three to host the largest number of SH scholarship international students are the University of Debrecen (UD), the Eötvös Loránd University (ELTE) and Budapest University of Technology and Economics (BME).

Figure 2. Number of Stipendium Scholarship students from 2015 to 2022. Source: Education Office, Higher Education Information System, 17



The University of Debrecen hosts 20% of the Stipendium Hungaricum Scholarship students, followed by the Eötvös Loránd University (14%) and the Budapest University of Technology and Economics (13%). The distribution of SH scholarship students in terms of educational level remained consistent during these years. The share of Bachelor and Master students is higher than that of doctoral students and those who are taking part in an undivided training programme. In the 2021/2022 Academic year, SH scholarship student bachelor students represented 38%, master students (34%), doctoral students (18%), students in undivided training programmes (7%) and other types of training programmes (3%) (I7). A majority of students (95%) are studying in programmes taught in English and the rest 5% are studying in Hungarian, German, Italian, Russian, Portuguese, Spanish and Swedish.

Hungarian internationalisation by inbound and outbound international mobility

The most visible aspect of higher education internationalisation is international student mobility (Hudzik, 2015). Inbound and outbound international mobility can be considered unbalanced as Kovacs and Tweneboah (2020) mentioned that the approximate number of Hungarians studying abroad is 10,000 while the number of international students in the academic year of 2020/21 is approximately 37,000. Besides, this imbalance can also be seen in Erasmus mobility programmes which is depicted in Figure 1 in the previous section. In the following section, the numbers of incoming and outgoing international mobility will be presented.

Inbound International Mobility

Hungarian higher education institutions have the most diverse international student body from different parts of the world. In 2020, students from

163 countries came to Hungarian higher education institutions. Currently there are more than 37,000 international students enrolled in Hungarian Higher institutions (I8). Of these, 13069 (34%) are enrolled in Bachelor programmes, 6336 (16.7%) in Master programmes, 10977 (28.9%) in undivided training programmes, 582 (1.5%) in specialized training programmes, 143 (0.4%) in higher education vocational training programmes, 2835 (7.47%) in doctoral training programmes, and 3983 (10.5%) in other programmes (all 37925).

The majority of international students come from within Europe (57%), and 31% come from Asia (OECD, 2019). The share of international students with respect to the total student population is 13 %, which has peaked to the highest during the past 10 years. German students comprise the largest group of international students with 3416 students, followed by China (2723), Romania (2645), Serbia (2238), Iran (1871), Slovakia (1693), Ukraine (1171), and Jordan (1143). It is notable that the share of international students by field of study is not proportionate. The percentage of international students studying medicine and agriculture is quite high, whereas those studying sciences and social sciences are quite low (Kasza, 2018).

International students can be put into four categories: 1. degree-seeking students from neighbouring countries whose nationality is Hungarian, 2. degree-seeking international students studying Medical and Health Sciences, 3. degree-seeking international students, 4. credit-seeking international students in short-term (credit or exchange) programmes (Kovács & Kasza, 2018).

1) Degree-seeking international students with Hungarian background. Hungary is a country neighbored by its own people. After the end of World War I, Hungary was forced to cede a large part of its territory to its neighbouring countries and lost two-third of its mainland. Nowadays, there are around 2.5 million Hungarian people living in

the neighbouring countries. This historical figure might elaborate why the first type of international students have Hungarian background. These students are attracted to cross-border studying in Hungary, especially in the universities near the border regions (Kasza, 2018). According to the latest higher education statistics (18), there are more than 8,000 international students from neighbouring countries studying in Hungarian higher education institutions which also counts those students in short-terms programmes. Among seven neighbouring countries, the number of students from Romania is the largest with 2645 students, followed by Serbia (2238), Slovakia (1693), Ukraine (1171), Austria (160), Croatia (78) and Slovenia (35). All these international students from the neighbouring countries represented almost one fifth of the total international student population (21.14%). Among international students with Hungarian background, 65% are supported by Hungarian state scholarships, 26% study on a defrayal basis and nearly all those who are in credit mobility programmes receive state grants or scholarships (Kasza, 2018).

2) Degree-seeking international students studying medicine and health sciences. This group of students represented 40% of the total number of international students in Hungary (those participating in short-term programmes are excluded) and these medical students make up 45% of self-financing students (Kasza, 2018). German students comprise the largest proportion of this group of international students. 16 % of international students studying medicine fields study on a defrayal basis while 84% study on a self-financing basis (Kasza, 2018).

3) Degree-seeking international students. Degree seeking international students make up 42 % of self-financing students and 4 % of degree seeking international students study on a defrayal basis, whereas 95 % study on a self-financing basis and

the remaining 1% are financed by the Stipendium Hungaricum Scholarship (Kasza, 2018).

4) Credit-seeking international students. Credit mobility students enrolled in programmes such as Erasmus+, Leonardo, and CEEPUS benefit from the financial support of EU funds (Kasza, 2018). There are nearly 1800 incoming credit-seeking international students under the framework of Erasmus+ (KA107) during the previous phase of Erasmus+ (19).

Outbound International Mobility

There are several mobility programmes for domestic students, instructors, staff, and researchers in the higher education sector to have foreign teaching, learning and training experience. One of the most famous programmes is Erasmus+, which offers mobility programmes for both students and staff in the higher education sector. For students, it offers the Study Mobility Programme (SMS), which can last from 2 to 12 months, and the Traineeship Mobility Programme (SMP), which can last a minimum of 60 days.

Within the framework of these student mobility programmes, students can study at a higher education institution abroad (SMS), do work placements or internships in a healthcare institution or organization (SMP), and can combine both or do a post-graduate placement.

According to the Statistics on applications in the Erasmus+ higher education sector during the 2014-2020 programme phase, the number of outgoing Hungarian students in higher education who have foreign learning and training experience within the framework of the Erasmus+ is provided in Table 1.

The number of outgoing Hungarian higher education students fluctuated during the phase of 2014 to 2020. However, at the end of the phase, the number of outgoing students peaked at 154.

Table 1. Outgoing Hungarian students in higher education within the framework of Erasmus+ international credit mobility KA107(2014-2020). Source: Tempus Public Foundation, I10.

Year	Student Mobility for Education	Student Mobility for Training	Total
2020	145	9	154
2019	102	6	108
2018	65	10	75
2017	95	0	95
2016	151	0	151
2015	131	0	131

In the first three academic years of the phase, there were no students to go abroad for training purposes. Obviously, Hungary has a lower number of students in higher education who went abroad for training purposes. The number of incoming teaching staff within the framework of Erasmus programme peaked at the highest number of 463

teaching staff from 52 countries in 2020, of which 74 % (342) arrived for teaching purposes and 26% came for training purposes. The number of inward mobility and outward staff mobility is balanced from 2015 to 2020 although the number of staff mobility for teaching is always higher than staff mobility for training purposes. In 2015 and 2016, the staff mobility is within partner countries and in 2017 onward staff mobility extends beyond partner countries (Table 2.). The highest inward and outward mobility regions in 2020 are Eastern partner countries such as Armenia, Azerbaijan, Belarus, Georgia, Moldova, and Ukraine.

International Mobility Experiences

This section elaborates on international mobility experience, based on the database of Eurostudent VII (I11). We will discuss two subtopics: activity and enrolment abroad. Study-related activity abroad includes temporary enrolment, internship/work placement, language course, research stay/field trip, summer/winter school, and other study-related activities abroad.

Table 2. Teaching staff mobility within the Erasmus programme. Source: Tempus Public Foundation Website, I10.

Year	No of countries	Staff Mobility for teaching or educational purposes (STA)		Staff Mobility for training purposes (STT)		Total
		Incoming	Outgoing	Incoming	Outgoing	
2020	52	342	339	121	112	914
2019	55	324	308	116	103	851
2018	44	298	285	131	108	822
2017	47	301	290	71	69	731
2016	37	208	194	70	71	543
2015	28	191	161	50	48	450

Temporary enrolment abroad is a formal status of a temporary enrolment outside of the country of observation at a legally recognized higher education institution and participating in an officially recognized degree programme; short-term mobility with the aim of completing a part of a study programme outside of the country of observation, e.g. ERASMUS.

These activities will be viewed by gender, age, the type of higher education institution, location of a higher education institution, type of study programme, access route, fields of study, parental financial status, parental educational level and work-experience. We can use only percentages during this analysis due to the nature of the downloadable data – this is a limitation – because the different variables are intermingled – e.g. the age cohort and the work-experience or the parental financial status or the fields of study. These intersectional positions (which can be favourable or unfavourable from the aspect of mobility) can not be described with these results.

25 countries are involved in the seventh wave of the research from EHEA. Hungary took part for the third time in Eurostudent and the data recording occurred in 2019 - before the pandemic. The number of the participants in Hungary is 7547 and participants come from bachelor, master or undivided training courses and short cycle degree programmes (ISCED 5). The sample was randomly selected from those students who have active student status in the Spring semester of 2018/2019. Part-time and day-time students were reached at the same time. The database was weighted to seven variables (e.g. gender, institutions etc.) (Hámor, 2021a). In the Hungarian subsample the rate of women was 53.8%. 75.4% took part in a day-time training. 63.3% came from bachelor level, 14.2% from master and 18.3% from undivided training courses. The most significant part of students belongs to the following study fields: economic sciences (20%), engineering sciences (16%) and

health science and teacher training (12 and 12%) (Hámori, 2021b).

Activity Abroad

On average, 19% of students in Eurostudent countries have completed temporary enrolment, an internship or work placement, or other type of study-related activities in another country (Gwosc et al., 2021). Hungary, compared to its counterpart Eurostudent countries, has a lower percent of students participating in any study-related activities abroad at any duration. Only 9% of the country's sample participated in a study-related activity abroad such as temporary enrolment, internship /work placement, language course, research stay/field trips, and winter/summer schools (Figure 3). Luxemburg has the highest proportion of students participating in study-related activity abroad (39%), which is followed by the Netherlands (26%), Austria (25%) and Switzerland (25%). The countries having the lowest study-related mobility abroad are Poland (7%), Turkey (7%), Romania (8%) and Hungary (9%).

There is no gender difference in any study-related activity abroad in Hungary. Both male and female students almost equally participated in mobility abroad programmes (female: 9.3%; male: 8.9%) and we do find significant difference in the case of the study location (capital city: 9.6%; population below 100 000: 8.5%; population between 100 000 and 300 000: 8.9%). The rate of participation is higher in the age groups above 22 years (below 22 years: 4.6%; 22-24 years: 11.1%; 25-29 years: 11%; 30 or older: 9.6%), in the case of full-time students (full-time students: 10.1%; part-time students: 6.5%). Slight differences can be identified according to the non-traditional or traditional route into higher education (7.1% and 9.2%) and working experience (students without paid employment during the semester: 9.8%; students working in paid jobs less than 20 hours per week:

10%; students working in paid job more than 20 hours per week: 7.5%). This mobility rate is slightly different in terms of type of higher education institution (university: 9.4%; non-university: 7.9%). The master student group has the highest involvement rate (15%) in mobility while the Bachelor students have lowest (6.8%). This pattern is consistent with the results of Eurostudent V (Kiss, 2014). Furthermore, this 'study-related activity abroad' rate is different in terms of academic fields. As seen in Figure 3, students from the academic field of arts and humanities have the highest rate in participating in any studyrelated activity abroad. By contrast, ICT and Education fields have the lowest

rate of participating in any study-related activity.

It is found that students with more prosperous parents have the highest mobility rate, whereas students with parents of an average or lower financial background have the lowest mobility rate (Figure 4).

This correlation may relate to the inequalities in the field of internationalisation. Similarly, students whose parents have a tertiary educational background (17.3%) are almost three times more involved in any study-related activity abroad than those students whose parents have a low educational background (6%). To sum up, the chances to access are not equal for every student.

Figure 3. The rate of study-related activity abroad in terms of study fields in Hungary (in percent). Source: own figures according to Eurostudent VII, I11

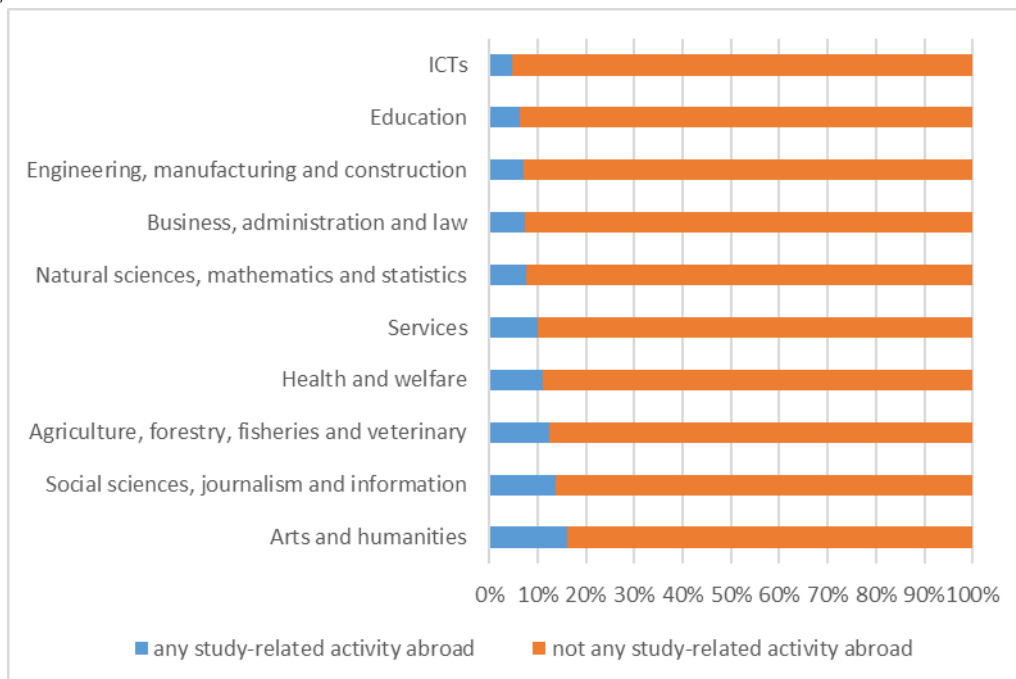
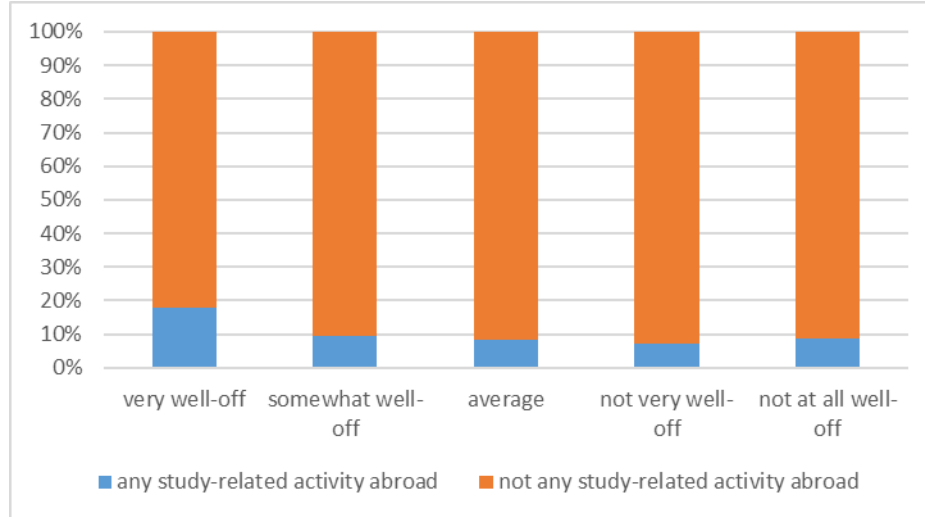


Figure 4. The rate of study related activity abroad in terms of parental wealth in Hungary (in percent). Source: own figure according to Eurostudent VII, I11



Temporary enrolment abroad

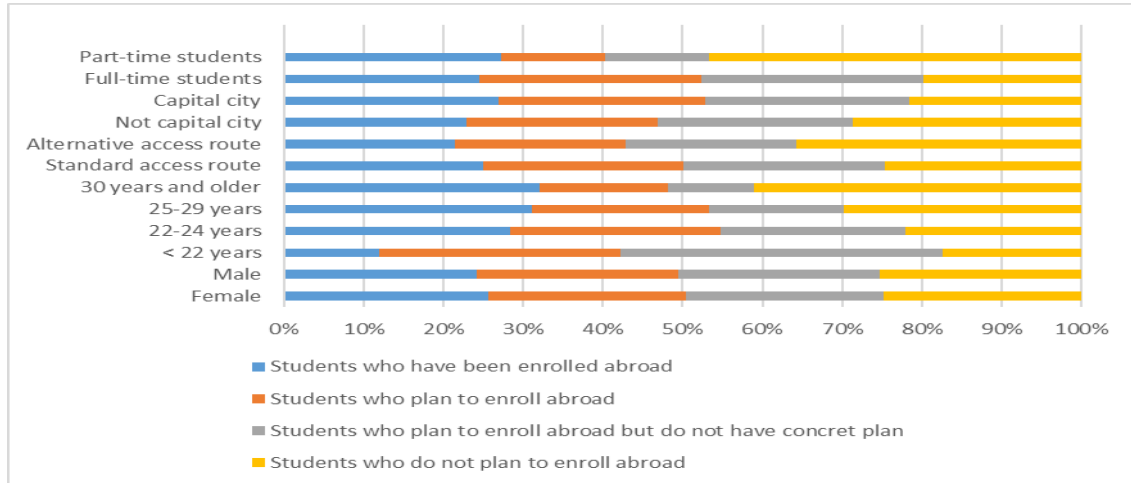
As mentioned before, this category can be described as a formal status of temporary enrolment outside the country. This subtopic covers experiences of enrolment abroad: students who have been enrolled abroad, students who plan to enrol abroad, students who plan to enrol abroad but do not have concrete plans yet and students who do not plan to enrol. In terms of gender, age, access route, by location of higher education institution, formal enrolment status, and prior work experience. Figure 5 describes these correlations.

Generally, it seems that there is no considerable gender disparity in enrolment abroad experience and mobility abroad intentions and plans – this correlation is similar to the patterns of study-

related activity abroad. However, age remarkably matters with mobility abroad experience, mobility abroad plans and intentions.

The students aged between 22 and 24 have studied abroad the most, more likely to have intentions and concrete plans to get more and more mobility experience abroad. Additionally, it is found that students having entered higher education with a direct access route are more active in overall mobility abroad experiences. Moreover, students from the capital city are more involved in mobility abroad experience than the students from other cities than the capital. Similarly, those students who are in full-time programmes are more likely to go abroad for study-related activities during their higher education.

Figure 5. Forming factors of enrolment abroad in Hungary (in percent). Source: own figure according to Eurostudent VII, I11



According to our presumption, there is a connection between work experience and enrolment abroad (Figure 6). Students having worked before entering higher education are less likely to participate in mobility abroad experience than those who did not work. Moreover, these groups of students have a weaker intention to study abroad, fewer concrete plans to go abroad to study

but more intentions *not* to study abroad compared with those students who did not work, or have prior work experience.

To sum up, the ‘royal road’ into higher education (standard access route), and the way of life in which studying stays in the centre of students’ life may increase the probability of enrolment abroad.

Figure 6. Relationship between work experience and enrolment abroad in Hungary (in percent). Source: own figure according to Eurostudent VII, I11

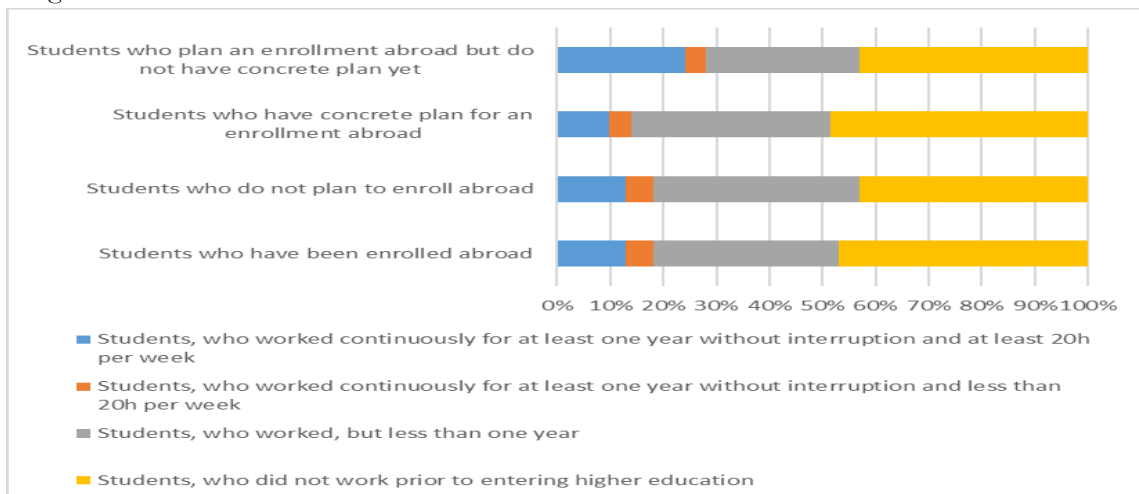
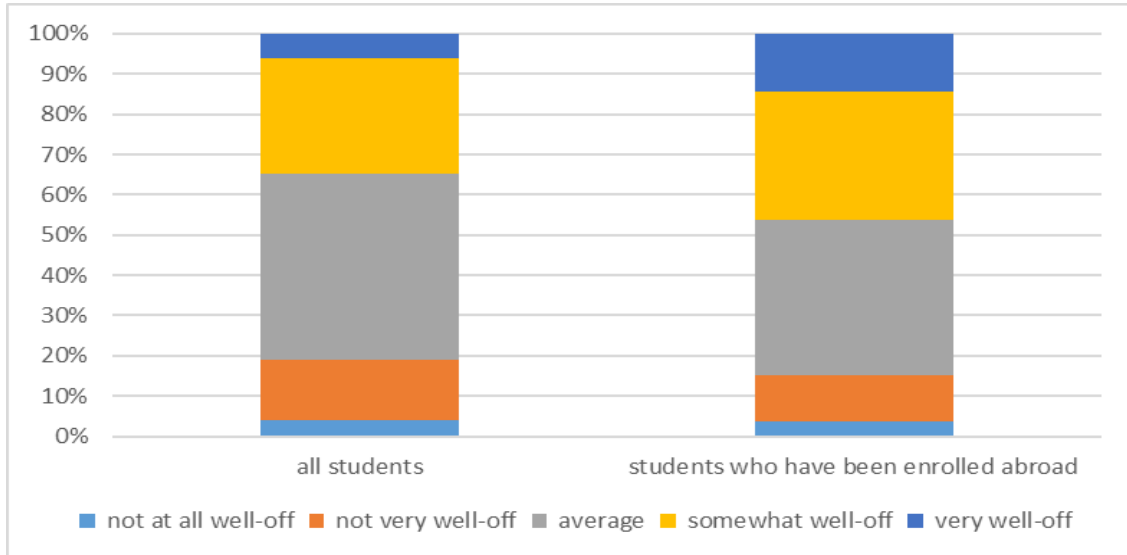


Figure 7. Relationship between parental financial situation and earlier enrolment abroad in Hungary (in percent). Source: own figure according to Eurostudent VII, 111



In the case of other variables, ‘students who have been enrolled abroad’ are more typical in the case of university students and in the study fields of ‘business, administration & law’ and ‘health and welfare’ (18.9% and 16.3%), full-time students (79.5%), students with a highly educated background (above ISCED 4: 76.1%) and students from universities (85.6%). Bachelor students (73.5%) and students from undivided training courses (20.8%) tend to participate more in this type of mobility. The relationship between parental financial situation and the enrolment abroad is described by Figure 7. Students above the average financial situation have got more chances to participate.

Summary

The aim of this study is to give a short overview on the internationalisation of the Hungarian higher educational system. The theoretical part of the paper attempted to reveal the features and elements of this process, and the research successfully

highlighted the factors that make the Hungarian scene specific. While some elements (educational policies inside and beyond the border, financial resources, decreasing number of student population, positions in the ranking lists) push the institutions toward the higher level of internationalisation, and several universities have been radically transformed after the Millennium. Several problems and challenges can be identified in the case of every actor: the incoming and outgoing students’ body, staff, the services of the universities etc. With the help of the programme descriptions, the expanding trend of internationalisation can be detected, but other research projects must reveal the situation of the participants from their points of view. In the case of Phd students within the framework of Stipendium Hungaricum scholarship, the Tempus Foundation has unveiled the motivation, satisfaction, future plans or founding sources with a quantitative method (Kupriyanova and Ferencz, 2022), but these data are rather descriptive – nevertheless, it is presumably significant feedback for the

institutions. These data reflect that the institutions were not fully prepared for the presence of these students, and the rapid increase of their proportion in every case. To sum up the Hungarian students' experiences and enrolment abroad, another remarkable fact can be identified: the unequal chances for access. The financial background of parents and the type of location of the higher education institution form the rate of participation, and as we can see, the chances of low SES students seem to be lower.

Our analysis has highlighted the role of the presence of labour-market and the standard route into higher education - the 'typical' way of students' life (full-time participation, standard route, less involvement in labor-market) is apparently connected with higher chances of participation. The impact of foreign studies on students was explained by various analyses (Carlson and Widaman, 1988; Mapp, 2012; Savicki, 2013). Naturally, we must consider acculturation stress but the international experience has several advantages for students e.g. in the field of language learning, intercultural competencies or self-efficacy. These positive yields can generate advantages on the labour-market or during career building, so these different accesses may amplify the already existing inequalities. With the help of the Eurostudent VII dataset, we were able to discover several features of Hungarian students' internationalisation mobility experience, and identified differences between the patterns of study-related activity and enrolment abroad according to the study fields. The rate of Hungarian participants is relatively low in European comparison and no growth has occurred between the two last waves of the analysis. This contrary tendency (between the trends of ingoing and outgoing mobility) was confirmed by Polónyi (2022), as well.

The limitation of the study was caused by worldwide COVID pandemic, because lockdowns also formed the rates of international mobility, and

in some countries the data process of Eurostudent VII occurred during these lockdowns. Besides that, we could not conduct statistical test – only descriptive percentages were used by us. Our future plan is mapping the situation of international students at the University of Debrecen from the aspect of educational choices and parental involvement, and bring more thorough findings of the mobility experience of Hungarian students with the help of this dataset.

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**LUANG ISLAND: COASTAL ECOLOGY SYSTEM
IN OUTERMOST SMALL ISLANDS (ESCAOSD), MALUKU-INDONESIA**

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Abstract

Coastal communities and their ecology are inseparable units, connected to one another. The Luang Island community is one of the coastal communities on the outermost islands in Indonesia-Maluku Province-Southwest Maluku Regency. Understanding the ecological system of the people of Luang Island is inseparable from how they live their daily lives, which then accumulates into knowledge, habits as well as patterns to regulate their life order through a long historical process of interaction with nature. This knowledge and habits depend on the geographical environment in which they live, in other words, the natural environment also influences the way they act and think. This pattern then plays a role in realizing the harmonization of their lives, to create unique social and cultural conditions which then become their spirit. This spirit can be seen in their daily lives. This study uses ethnographic research with an ecological anthropological approach. Data was collected through literature study techniques, interviews, FGDs, and participatory observation. The data analysis technique used in this research is ethnoecology. The results of this study indicate that the influence between community relations and nature on Luang Island is reflected in the use of everyday language in communication, the ability to express sea areas based on local knowledge, and presenting natural elements into the social culture of the people of Luang Island. The

results of this study are useful for ecological studies in the outermost small islands in Indonesia and as a comparison among the forty-eight archipelagic countries in the world, both tropical and non-tropical.

Keywords: Luang Island, Coastal Area, Ecological System and Outermost Small Islands

Discipline: cultural anthropology

Absztrakt

LUANG-SZIGET: PARTI ÖKOLÓGIAI RENDSZER A LEGKÜLSŐ KIS SZIGETEKEN (ESCAOSD), MALUKU-INDONÉZIA

A tengerparti közösségek és ökológiájuk elválaszthatatlan egységet alkotnak és kapcsolatban állnak egymással. Luang-sziget közössége, az Indonézia-Maluku tartomány délnyugat-malukui kormányzóságának legkülső szigetein található tengerparti közösségeinek egyike. A Luang-szigeten lakók ökológiai rendszerének megértése elválaszthatatlan attól, ahogyan élnek mindennapi életüket, amely aztán a természettel való kölcsönhatás hosszú történelmi folyamatán keresztül tudássá, szokásokká és életrendjüket szabályozó mintákká halmozódik fel. Ezek az ismeretek és szokások attól a földrajzi környezettől függenek, amelyben élnek, más szóval a természeti környezet is befolyásolja a viselkedésüket és gondolkodásukat. Ez a minta azután szerepet játszik életük harmonizációjának megvalósításában, egyedi társadalmi és kulturális feltételek megteremtésében, amelyek aztán szellemiségükké válnak. Ez a szellemiség a mindennapi életükben is megmutatkozik. A tanulmány ökológiai antropológiai megközelítésű etnográfiai kutatást alkalmaz. Az adatgyűjtés irodalomkutatási technikákkal, interjúkkal, fókuszcsoportos megbeszélésekkel (FGD) és részvételi megfigyeléssel történt. A kutatás során etnoökológiai adatelemzési technika alkalmazására került sor. A tanulmány eredményei rámutatnak arra, hogy a Luang-szigeten a közösségi kapcsolatok és a természet közötti hatás tükröződik a mindennapi nyelv használatában, a kommunikációban, a tengeri területek helyi tudáson alapuló kifejezésének képességében és a természeti elemek megjelenítésében a Luang-szigeti emberek társadalmi kultúrájában. E tanulmány eredményei hasznosak az Indonézia legkülső kis szigeteinek ökológiai vizsgálataihoz, valamint a világ negyvennyolc - trópusi és nem trópusi - szigetországának összehasonlításához.

Kulcsszavak: Luang-szigetek, Part menti területek, Ökológiai szisztéma és külső kis szigetek

Diszciplína: kulturális antropológia

Introduction

Ecologically, the coastal areas of the outermost small islands in the tropics and sub-tropics are strongly associated with coral reefs, seagrass beds (Bates et al., 2014), and mangrove forests (Burt et al., 2009), which can support ecosystem sustainability. Sea and the lives of its people (McCarthy et al., 2001). According to international agreements, the coastal area is defined as the transitional area between the sea and the land, towards the land covering areas that are still affected by the

splashing of seawater or tides, and towards the sea covering the continental shelf (Burkett et al., 2001; Cao & Wong, 2007; Ruddle & Satria, 2010). In this area, there are species that use corals, seagrasses, and mangroves as their habitat for economically important fish such as groupers, Napoleons, giant clams (*Tridacna gigas*), sea cucumbers, oysters, and others so that commodities like this can be said to be small island specific commodities and high economic value. The main characteristic of this commodity is that it has dispersal characteristics

that depend on coral reefs and seagrasses so that the sustainability of its stocks is influenced by the health of corals and seagrasses (Balai Pengelolaan Sumber Daya Pesisir & Laut Padang & Direktorat Jenderal Pengelolaan Ruang Laut, 2018; Dinas Kelautan Dan Perikanan Provinsi Maluku, 2021; Hutubessy & Mosse, 2021; Utomo, 2010). Regarding the management of the coastal environment, the Government of Indonesia recognizes local wisdom as a conservation effort contained in Law number 32 article 1 paragraph 30 of 2009 concerning the protection and management of ecology based on local wisdom, arguing that local wisdom is the noble values that apply in the governance of community life to protect and manage the environment in a sustainable manner.

Indonesia is one of the archipelagic countries and occupies the first position as the largest archipelagic country in the world with a total area of 5,180,053 km² (Akimoto, 2001; Bernadie, 2003; Kementerian Kelautan dan Perikanan Republik Indonesia, 2017; Kementerian KKP Republik Indonesia, 2021; Mohammad et al., 2016). The sea area is larger than the land area. According to calculations by the Geospatial Information Agency (BIG) and the Center for Hydrography and Oceanography (Pushidros) of the Indonesian Navy, the sea area is 3,157,483 km² and the land area is 1,922,570 km². It was recorded at the United Nations Group of Expert Geological Names meeting in 2022 that Indonesia has 17,504 islands and the outermost small islands totaling 111 and 34 provinces (Malik et al., 2019; Marewa & Parinussa, 2020; Oegroseno, 2009; Pemerintah Republik Indonesia, 2017).

The 111 outermost small islands are bordered by ten countries both land and sea (Newman, 2012; Paasi et al., 2022; Purwanto & Mangku, 2016; Smith et al., 2016; Villa et al., 1992). The population of Indonesia recorded by the Directorate General of Occupation and Civil Registry of the

Republic of Indonesia in 2022 is 275,361,267 people (BPS, 2022).

The coastal areas of the outermost small islands in Indonesia have high potential for natural resources and environmental services and can be used as the basic capital for implementing Indonesia's future development. This area provides productive natural resources such as coral reefs, seagrass beds, mangrove forests, fisheries, and conservation areas. Small islands also provide high environmental services because of their natural beauty which can drive the marine tourism industry. On the other hand, the utilization of the potential of small islands is still not optimal due to government attention and policies so far that are more land oriented.

The study of coastal communities and the ecology of the outermost small islands from an ecological anthropology point of view is still limited. This is understandable due to the long distances and limited means of transportation to and from the islands as well as the availability of academic data. Research in this place is mostly carried out from the perspective of geopolitics, fisheries, and surveys on the health of marine ecosystems and the presence of marine biota. Likewise, research on Luang Island is still very minimal academically. There are several previous researchers/writers such as Müller Wismar (1914) regarding the beliefs of people in the Babar Archipelago including Luang Island, Taber and Kathy (1989) the study of phonology and morphology on Luang Island, Pannel (1978) study of Hygera Lai from the point of view of ecology and economics, De Jonge and Van Dijk (1995) on the spread of language and culture from Luang Island to other islands in Southwest Maluku, Karuna, and Serpara examine the local wisdom of Luang Island as a support for learning (2022), Indonesia-World Ecology Institute conducted a survey of the marine ecosystem of Luang Island (2015-2017).

Related to this, the authors examine the people of Luang Island holistically (history, social, culture, ecology, and language) using an ecological anthropology approach, ethnographic methods, and data analysis techniques adapted to the three major questions in the main research. Thus, it will produce academic work that is comprehensive and scientifically justifiable. However, in this paper, the author only discusses one part of how the relationship between the Luang people as a coastal community builds a relationship with nature as a system, which is interdependent and influences one another.

Research Questions and Objectives

The question in this research is how the relationship between the Luang people and nature and nature influences their culture? The purpose of this research is to explore the characteristics of human-environment interaction on Luang Island in Maluku Province-Indonesia. This study will be one of the analyzes to answer the main questions in the third part of the study on Luang Island about the extent to which nature influences the culture of the people of Luang Island. The answer to this question requires an exploration of how the determinism of the natural environment plays into the lives of the Luang people. Therefore, interpreting this we see the representation of natural elements in the socio-cultural life of the Luang people as a result of the reciprocal relationship between the two.

Informant Retrieval Framework

The sampling technique in this study was based on non-probability sampling (Creswell & Creswell, 2017; Kumar, 2019; Sugiyono, 2013). This technique does not provide equal opportunities for members of the Luang Island population to be selected as informants. This study used snowball sampling and incidental sampling. This snowball sampling

technique can make it easier for researchers in the data collection process on Luang Island to obtain informants because they get recommendations from previous or key informants (Harreveld et al., 2016; Robinson, 2014; Sedgwick, 2013). In addition, for incidental sampling researchers have the freedom to determine samples based on coincidence (Goodman, 1961; Patton, 2015), so that in the research process on Luang Island, researchers can take samples other than those based on snowball sampling, from anyone they meet without prior planning (Biernacki & Waldorf, 1981; Handcock & Gile, 2011). The samples in this study included village officials, traditional leaders, church priests, fishermen, teachers, youth leaders, and women leaders.

Data Collection, Analysis, and Time of Research

In this study, researchers used an ecology anthropology approach with a descriptive qualitative method. The aim is to understand the relationship between the people of Luang Island and their ecosystem. With this method, researchers can describe how nature influences the culture of the people of Luang Island. Data collection techniques used in this study are; literature study (Hagen-Zanker, 2008; Tuegeh et al., 2021; Walliman, 2015) researchers search for and collect literature related to ecology anthropology, ecology of Luang Island, history, the social, and culture of Luang Island and Indonesian bathymetry maps through journals, articles, research reports, and books.

The interviews conducted to collect data on Luang Island were face-to-face in-depth interviews (Ary et al., 2018; Creswell & Creswell, 2017; Dawson, 2009; Kumar, 2019; Patton, 2015). This interview is open or unstructured, in which the researcher only prepares a few questions and interview guidelines. This model interview helps researchers to explore more detailed information or data about

every social and cultural component of the Luang people that relate to one another as a system that has a function in maintaining the balance and order of the ecosystem on Luang Island. It also helps researchers to understand how the (Mousalimas, 1990; Sekowski, 2022; U Müller, 2003) mentality (Mousalimas, 1990; Sekowski, 2022; U Müller, 2003) of the Luang people drives how they act and respond to the environment in which they live (Cooley, 2009; Pritchard, 1970). Related to this, James Baldwin (1897) emphasized that without studying the mental processes of individuals or a social group we cannot understand what lies behind their actions. Thus, how the Luang people think and perceive their world is the main thing that needs to be considered in this study. In the interview process, the researcher uses a recording device and takes notes, this aims to avoid data distortion (Harrevelde et al., 2016; Milles & Huberman, 1994; Tolley et al., 2016; Vander Stoep & Johnson, 2008).

Focus Group Discussion (FGD) is a discussion (Hennink, 2014) facilitated among community groups on the topic being researched. FGDs were used to explore the collective understanding and various perspectives of the Luang people on how they Luang people map the sea area. Group discussions go beyond gathering information about individual knowledge or opinions, supporting the validity of data collected by other observational methods, gathering high-quality information on specific topics quickly, and assisting in the identification of key informants for interviewing how they relate to nature and resource use in the sea. To find out about the area of distribution of types of marine resources, areas of shallow sea areas for activities, as well as boundaries between shallow areas and deep-sea areas based on the knowledge of the Luang people.

Observation is carried out with a commitment to connecting with the body and mind to engage with what the Luang people are doing and find out why,

experience the activity firsthand, feel (Walliman, 2019) what the event is like, record the researcher own perceptions (Spradley, 1980) and the views of local people (Boas, 1911). Observation activities in research on Luang Island proceeded according to the situation in the field, sometimes researchers conducted observations together with interview activities or also under separate circumstances (Ellen, 1984; Hammersley & Atkinson, 2019; Reeves et al., 2008). The author made direct observations in the field regarding what was seen and heard, and verbal/oral material was recorded (Black & Champion, 1995; Suwartono, 2014).

Observations were made on the daily life of the people of Luang Island with the aim of seeing their activities, what they do, and how they behave in the sea as the center of their activities. Not closed other public spaces can also be observed, church buildings, state attributes, and others to see the presence of natural elements in church ornaments or state attributes. Regarding language, because they use the local language, the writer tries to be directly involved in daily conversations and build conversations starting with the family where the writer lives and also other communities with the help of translators, the writer is involved with them in fishing activities in the deep sea, visiting sacred areas in several surrounding small islands and shallow areas to calculate the area of shallow areas, directly observing the mapping of sea areas according to their knowledge. This participatory observation also aims to confirm the data that has been obtained through literature studies, interviews, and FGDs.

After all the data has been collected, the next step is for the researcher to carry out an analysis using the ethnoecological analysis method. Ethnoecology ethnoscience is both a theory and an analytical tool used in the study of ecological anthropology (Barnard & Spencer, 2010). This technique helps the authors to identify and analyze the implicit cultural rules that underlie the behavior of

the Luang people in acting related to the environment. This research takes place in July-August 2022.

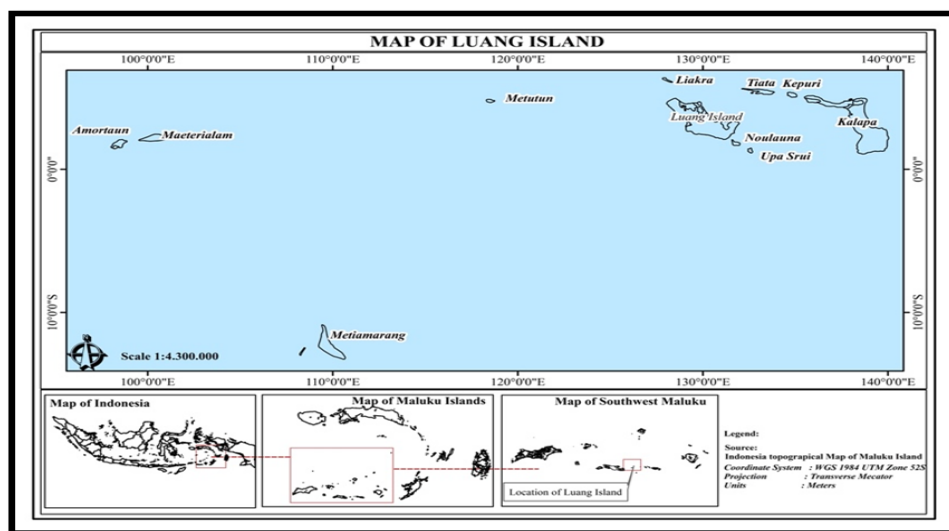
Research Results and Interpretation

Geography and Ecology of Luang Island Related to the results of this study, first in this section the author will describe the ecology of Luang Island and then explain how the relationship between the Luang people and their natural environment. As explained in the introduction, studies on remote and isolated islands are rarely carried out, including in the field of ecology anthropology of Luang Island in Southwest Maluku Regency, Maluku, Indonesia. The culture of the people of Luang Island, which is a means of connecting them and their environment, has not been studied scientifically outside of research by Pannel 1997, an Australian researcher because of its remote location. Luang Island is one of the outermost small islands in Indonesia.

Why is it called that?

Because the Small Outer-most Islands (PPKT) are small islands with an area of ≤ 2000 km² and have geographic coordinate base points connecting the archipelagic sea baselines in accordance with the law international and national. PPKT is also designated as KSNT (Certain National Strategic Areas), namely areas related to state sovereignty, environmental control, and/or world heritage sites, whose development is prioritized for national interests. This means that PPKT requires special management so that its position as a border area of the Unitary State of the Republic of Indonesia (NKRI) has sovereignty, maintains environmental sustainability and natural resources contained therein, and provides maximum benefits for the welfare of society (Alihar, 2018; Malik et al., 2019; Pemerintah Republik Indonesia, 2017) Administratively Luang Island is in Maluku Province, Southwest Maluku Regency. Luang Island is adjacent to Timor Leste in the west and the Australian continent (Karuna & Serpara, 2021; Kissiya & Biczó, 2022; Malik et al., 2019; Pannell, 1997) in the south. See figure 1.

Figure 1. Map of Luang Island Source: authors (August 2022)



Luang Island consists of two villages, West Luang and East Luang. Luang Island has eleven small islands around it including Liakra Island, Tia-ta, Kepuri, Kelapa, Nowlauna, Upasrui, Metutun, Upasrui, Wekenau, Amortaun, Metrialam, and Metiamarang. These islands are in the possession of Luang Island. Only three of the eleven small islands are inhabited. Every Sunday after Sunday worship, some Luang people go to the islands. They stayed there for six days and returned on Saturday afternoon or Sunday morning. On these islands, the Luang people usually catch fish, make salted fish and farm seaweed. The total area of Luang Island is 622 km² with a population of 1,994 people (BPS Kabupaten Maluku Barat Daya, 2022; BPS Provinsi Maluku, 2022). See table 1.

In general, the mainland of Luang Island has rocky soil structures and dry soil types. So for farming or making plantations, it is not optimal, it can even be said that it is not suitable. Approaching the area of the mountain peaks and mountain bodies there are several gardens or *Lutur*. *Lutur* is a garden area surrounded by a stone fence about half a meter high. Made in the form of a square or circle. The purpose of making this stone fence is to prevent animals from coming into damage or eating the plants in the *lutur* circle.

According to the interview, *lutur* is also related to the history and a connection with a myth on Luang Island regarding traditional fish farming on the coast. The results of the author's observations, in the *lutur* are only visible a few cassava trees, and

wild grasses dominate this area. The plants in this *lutur* area seem reluctant to thrive, as the traditional saying goes that "life doesn't want to die, it does not want to live". They must fight the hardness of the rocks and soil in the region to fight for food for their growth.

When compared with the forests on Seram Island, the difference is very much. Seram Island's land is very fertile, and all plants grow well and do not even require special care for long- and short-lived plants. Most of the land area, both at the top of the mountain and the circle of the mountain body, looks brownish-red grass. Grow tall coli trees with lush leaves and fruit. The fruit of the koli tree is eaten by the Luang people and processed into palm wine. There are also cactus plants that thrive among the rocks, the roots of large and small trees stuck firmly between the large rocks as if they do not want to let go of their coils. There are several deer seen roaming the body of the mountain. While on the coast there are many coconut trees, which are used by the Luang people for their daily life. In almost all circles at the foot of the mountain, there are several plants that thrive in gaps in the arrangement of small stones and look like bonsai plants that are stunted and have left. Meanwhile, within the village environment, there are several types of tropical tree plants that can be consumed by the Luang people such as breadfruit trees, ompa trees, and tamarind trees. Apart from these plants, the native also raises several domestic animals such as pigs, goats, chickens, and ducks.

Tabel 1. Total Population on Luang Island. Source: BPS Kabupaten Maluku Barat Daya & BPS Provinsi Maluku, 2022

No	Nama Desa	Penduduk		
		Laki-laki	Perempuan	Jumlah
1	Luang Barat	423	408	831
2	Luang Timur	587	576	1.163
Total		1010	984	1.994

As it is well known, the eastern part of Indonesia is the region with the richest and most diverse coral reefs in the world (Veron, 1993). Southwest Maluku Regency is included in the world's coral reef triangle line, Luang Island is automatically in the world's coral triangle line because it is close to Timor Leste and borders Australia. It is not surprising, then, that Luang Island has the second-largest coral reef area in Indonesia (Pannell, 1997) and large seagrass areas with a coral displacement rate of 90% when compared to other areas in Indonesia (Dinas Kelautan Dan Perikanan Provinsi Maluku, 2021; Estradivari et al., 2015, 2016; Soleman & Noer, 2017; Wagey & Z, 2008).

This condition strongly supports the abundance of biological resources on Luang Island and synergizes with the culture of the local community in managing their environment in traditional ways based on local ecological knowledge that they have until now (Estradivari et al., 2015; Hutubessy & Mosse, 2021; Kissiya, 2021; Leha et al., 2020).

In addition, the position of Luang Island is very strategic because it is in the Indonesian Archipelagic Sea Channel (ALKIIB)(Kissiya & Biczó, 2022b). Indonesian Archipelagic Sea Lanes (ALKI) are sea lanes that are determined as a channel for the implementation of the right of archipelagic sea lanes passage based on the international law of the sea conventions. This channel is a shipping and flight channel that can be used by foreign ships or aircraft over the sea to carry out peaceful shipping and flights in the normal way (Tamami & Siswanto, 2021).

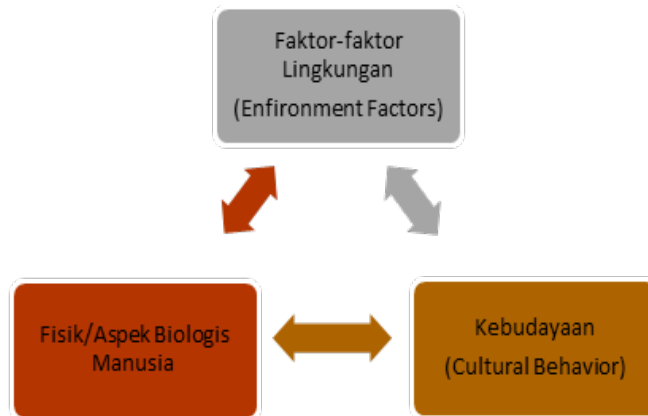
The designation of ALKI is intended so that international shipping and flights can be carried out continuously, directly, and as quickly as possible and not be hindered by Indonesian waters and air space. ALKI is set to connect two free waters, namely the Indian Ocean and the Pacific Ocean. All foreign ships and aircraft wishing to pass north or south must go through ALKI (Oppenheim, 1952; Kissiya, 2020; Parthiana, 2014).

Luang People's Interaction with Their Natural Web

The dynamics of human life require patterns of interaction and adaptation to the surrounding natural environment. From the perspective of deep ecology, humans are not objects that are separate from this world or isolated, but as a fundamentally connected and interdependent network of phenomena (Capra, 1997; Deval, 2007; Naess, 1973; Naess & Snyder, 1995). Deep ecology recognizes the intrinsic values of all living things and views humans only as a special part of the network of life. The basic philosophy of deep ecology is called Naess as ecosophy which means the wisdom of managing life in harmony with nature as a household in a broad sense. In this sense, the environment is not just a science but a wisdom, a way of life, and a pattern of living in harmony with nature. Thus, humans are not the only center of the universe or anthropocentric system (Capra, 2004; Capra et al., 1993; Naess, 2010). The question is how humans relate to nature, especially the people on Luang Island. Do these interactions influence each other and to what extent do they represent nature in their lives? Adaptation of the Luang people is key (Bennet, 1976, 2017; Orlove, 1980; Rappaport, 1968) establishing relationships with the environment. In adapting the Luang people have the capacity to learn and anticipate (Bennet, 2017), adjust to change, systemic relationships, and interdependence between components (Kottak, 1999; Pinkosky, 2008; Vadya & Rappaport, 1968) to be able to live their lives. Meanwhile, culture is a bridge for the Luang people in establishing this relationship. The relationship between humans, environment, and culture are three factors that are intertwined internally. See figure 2.

To understand the social and cultural dynamics of a society, it is necessary to pay attention to how the historical journey (Biczó, 2004, 2019a, 2019b), mental and geographical or the environment of the society in which they live (U Müller, 2003).

Figure 2: Human Relations, Environment and Culture. Source: Authors Februari 2023



There is hardly any experience or knowledge that is not historical. In the course of this history, there have been processes of assimilation and acculturation both intentionally and unintentionally. Likewise, for the Luang people, to understand the dynamics of the relationship between them and their natural environment need to look at history, mentality and what factors are the background of their relationship with the surrounding environment. The knowledge they possess is an accumulation of the results of interaction and adaptation through a long historical process that has been passed down from generation to generation by their ancestors until now, of course, accompanied by a strong mentality. The mentality is the deepest layer of individual cognition that forms social group cognition in acting and viewing the social world (Mousalimas, 1990).

The results of the interaction between the Luang people and nature can be seen through the presence of natural elements in socio-cultural life, this is found in several oral traditions through myths about the sea and the destruction of islands by sailfish or Upasrui. Presenting sea animals as symbols in the Matoa culture, Hygera Lai rituals that

aim to protect marine resources, Pamali, Bameti, the tradition of collecting marine resources at low tide using traditional technology. Apart from that, maritime concepts are also used as patterns in village spatial planning. Their closeness to nature can also be found in understanding and using natural signs as a guide. Such as using the direction of the stars, moon, and wind as a compass in sailing activities, fishing at sea, and doing other work. In addition, they also have the ability to map the sea area. These relationships have existed since their ancestors and the results of this have shaped their social culture. In this section, the authors will does not explain everything mentioned above. In this part, it will be explained how natural elements are presented in the cultural life of the people of Luang Island, such as a boat as a symbol in mapping village plans, mapping marine areas, and naming them according to their knowledge. Representation of marine biota as an attribute in supporting life such as in church, and terms used in daily conversation that refer to natural elements.

Anthropology also goes to sea (Strang, 2009), boats are a means of sea transportation for coastal communities (Hans, 1993; Horridge, 1981; Lapijan,

2017; Sopher, 1965). It has been explained at the beginning of this paper that the Luang people are sea people and depend on the sea for their lives. The author can also call it the sea tribe because they carry out all their life activities at sea and function boats as a means of mobilization, this refers to the opinion of Indonesian maritime expert Lopian about the characteristics of sea people (Bernadie, 2003; Hall, 2019; Marsetyo, 2018; Nontji, 2007).

Therefore, talking about the sea, definitely talk about the transportation used by them. The boat is a very important means of transportation, not only as a means of transportation but also as a symbol for the Luang people in arranging the location of their homes within the village environment. The boat has more meaning than just a maritime vehicle, it is used as a symbol. In general, the representation of a boat as a symbol can be divided into two categories.

First, the boat is used as a guide in general spatial planning.

Second, as a vehicle for expression to convey messages. The two villages on Luang Island are likened to a boat. Referring to the symbolic direction of sailing is divided into three zones,

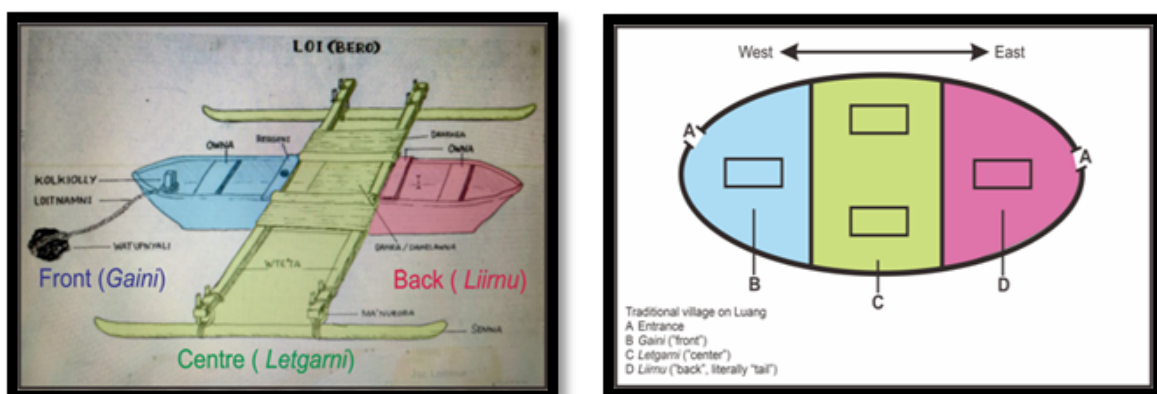
front or (*gaini*) middle (*latgarni*), and rear or stern (*liirnu*).

The ship's crew is made up of members from four families, each of which has its own residence. These houses were built according to the four cardinal directions. The pattern of the four cardinal directions on this compass governs how the arrangement and layout of the village plan on Luang Island. Members of two families always inhabit the central region and the other two families inhabit the fore and aft zones (de Jonge & van Dijk, 1995; Kissiya & Biczó, 2022a). See figure 3.

The boat and the sea are like two sides of a coin that cannot be separated. Where there is a sea there must be a boat and where there is a boat there must be a sea. Talking about the sea on Luang Island, according to the author, refers to two things: first, the sea as a place that contains water that tastes salty and has its own ecosystem, and second, as a place or public space that has meaning (Carr et al., 1992).

Why is that? The sea is not just an unreal and inactive storage space, but a real room (Foucault & Miskowiec, 1986; Hakim et al., 2009), active and participates in controlling and forming awareness (Kusno, 2000) of the Luang people's social culture.

Figure 3: House Plan Based on Boat. Source: Kalvin Karuna (2012) dan de Jonge (1995)



The sea also forms the collective memory of the Luang people as “sea people”. As sea people, of course, they really know and understand the existence of their sea. It is not surprising that they have a knowledge system regarding the mapping of sea areas based on the level of seawater depth. Here the depth of the seawater is measured by the anatomy of the body according to their knowledge. The Luang people divide the depth of *ofmeti*/shallow seawater into three parts namely, *met kerna*, *met etla torni*, and *metlolaitnebelni*.

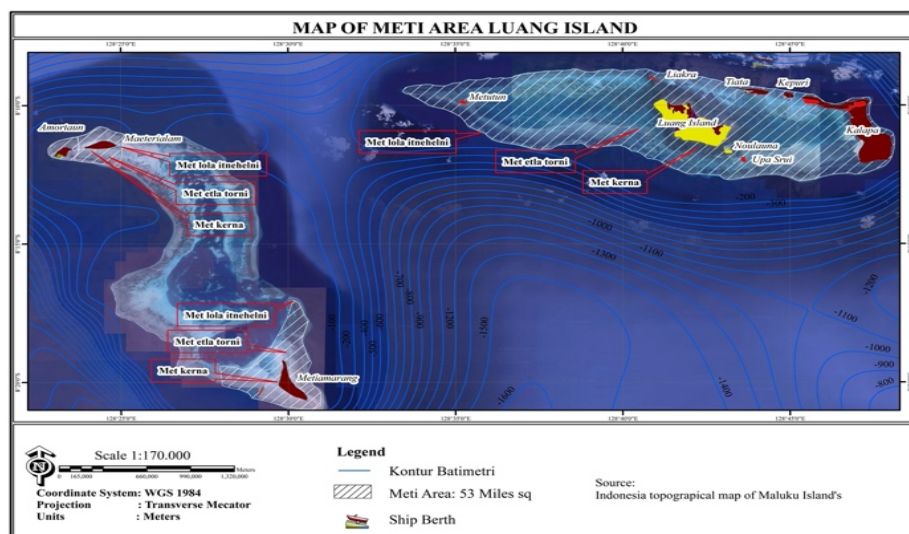
Met Kerna (*dry meti*), the condition of the sea water receding to the size of an ankle. Under these circumstances, a white sand dune will appear in the middle of the ocean and there are small holes filled with water and marine life. This condition allows the Luang people to carry out activities to collect fish and other marine biotas. They also usually walk from one island to another. Except from and to Metiaralam Island and Amartaoun Island, because there is a deep ravine between the two islands. *Met etla torni*, seawater conditions in this area are in size from feet to knees. In this condition, seawater like this seagrass meadow area can still be seen, as fish and other marine biotas. *Met lolaitnebelni*, according

to the knowledge of the Luang people, the condition of the sea water receding at this level is the boundary between the shallow and deep-sea areas.

They usually fish and work on agar cultivation. The measure of the depth of the water in this shallow area starts from the feet of the waist. The reason why they use the anatomy of the human body as a measure of the depth of this shallow area or *meti*. The author has not found a reason for this. In the next research, the author will explore this in more depth.

The tidal conditions on Luang Island are very different from other islands in Maluku. Luang Island has a very wide area of shallow or *meti*. The total shallow area of Luang Island is 53 miles (85,295.232 km²). In general, tides in various regions can be distinguished into four types tipe (Ben Elghali et al., 2007). The types of tides that occur on Luang Island are included in the type of mixed tides with a single daily inclination. This type of tide is a type of tide that occurs in one day, there is one high and one low tide, but sometimes there are two highs or two lows (Estradivari et al., 2015, 2017). See figure 4.

Figure 4: Marine Area Mapping Based on Shallowness Level. Source: Authors Agustus 2022



The Luang people see the sea as a cosmic unity. The concept of cosmic unity cannot be separated from the mythology that frames the Luang people's concept of thinking. They believe that the cosmos consists of two parts called "up/sky/north/air" and "under/earth/south/sea/soil, each of which has rulers in the form of humans and shells (*Tridacna Gigas*) (Jacobsen, 1896; van Hoeyvell, 2014; van Klinken, 2001). The God of heaven is symbolized by a man "brave, dashing and mighty". The God of the earth is shown in the form of a shell (*Tridacna Gigas*) which is identified with women. For the Luang people, this earth goddess is a symbol of the source of all fertility. Horizontally, the relationship between "up/sky/north/air", and "under/earth/south/sea/soil" is a cosmic unit that builds their respective identities. Vertically, according to the original beliefs of the Luang people, the formation of the world and the birth of humans is the result of a meeting between two elements, namely the sky, which is male, and the earth, which is female.

In the maritime tradition of the Luang people, the front of the boat is usually decorated with shells (*Tridacna Gigas*) and fish figures (Jacobsen, 1896; Müller, 1914). Fish and shellfish are symbols of the marine wealth they have. They believe that fish bring good luck, fertility, change, health, and

feelings into their lives. In addition, they also associate fish with the water element which means stability, balance, and peace of mind. We can find respect for these two marine biotas on the altars of the two churches on Luang Island. See figure 7.

In daily conversations, researchers see that the Luang people unconsciously use natural elements, both land, and sea, in communicating. With these taxonomies, we can find out how the Luang people know about the world around them.

They interpret the physical environment as they are in it. It is from here that we can see the ways in which the Luang people understand and think about events and objects in their world. This shows us how the relationship between human thought processes and the physical and ideational aspects of culture.

This subfield of anthropology is rooted in Boasian cultural relativism, influenced by the anthropological linguistics pioneered by Conklin, and closely aligned with the psychological investigation of cognitive processes.

It emerged as a separate field of study in 1950, when ethnographers sought to find the native point of view, adopting an emic approach from anthropology (Conklin, 2007; do Couto, 2014; Fill & Mühlhäusler, 2006; Frake, 1968; Haugen, 1972 ; Sapir, 1912)

Figure 5: Church Altar in the form of Napoleon Fish, Grouper Fish and *Tridacna Gigas*. Source: Authors. (Juli 2022)



These taxonomies have more than one meaning or are referred to in linguistic anthropology as metaphors (Holland & Quinn, 1987; Quinn & Strauss, 1998). Metaphors are tools that guide our perception of the environment and our interactions with it (Bastardas-Boada, 2017; Fill & Mühlhäusler, 2006; Haarmann, 1986; Sapir, 1912). Likewise, the Luang people, indeed are not aware that the words or the taxonomies of the language they use in communicating are representations of natural elements. But researchers while in the field see that through involvement in their daily life conversations and direct observations. See table 2.

The table above shows an example of local words or terms used by the Luang people in communicating. The word "puri" is an infinitive word that in its true sense refers to one of the small islands around Luang Island which is named "Kepuri/Kpuri Island" and is short in size. The term "Puri" also has many meanings depending on the context of their conversation. The term "puri" is used by the Luang people to express something short, clear, brief, and don't talk too much, or "too long". The term "puri" which is used daily by the Luang people can be the same as other

communities but has a different meaning. "Puri" for the Ambonese means "fish puri" a small fish, for the Javanese "puri" is one of the rooms in the palace. For those who are Hindus "puri" refers to a place of worship "house of worship". Thus, the local terms and various concepts that refer to environmental classifications, existing in a community, are basically the best way to understand their environmental knowledge system (Haarmann, 1986; Haugen, 1972; Trampe, 1990).

Conclusion

The people's closeness to the natural environment, especially the marine environment in which they live, is an undeniable socio-cultural fact. The relationship that exists between them is not just a meaningless life. The environment for them is not a mechanical machine that is only moved for their interests and not an empty, homogeneous, and eutopian space (Foucault & Miskowiec, 1986), but on the contrary a space that is truly imbued with quantity and quality. They regard nature as the space of primary perception, the space of their dreams and desires in it with qualities that appear to be intrinsic to all its contents.

Table 2. *Word/Expressions Luang Dialect/Languages. Source: Analyses by author according to research result, (Juli-Agustus 2022)*

Language/Dialect and meaning	Word/Expression 1	Word/Expression 2	Word/Expression 3
Luang	Puri	Mlyolanekwa' la <i>purinekwa</i>	Bicarasingkat dan jelas
Melayu Ambon	The name of a type of fish	Puri Fish	Tiny fish
Indonesia	Istana atau Keraton	Salah satu ruangan di dalam istana	Rumah Pemujaan agama Hindu
English	Kepuri Island	Just talk <i>puri</i>	Just talk clear
Really Meaning	Kepuri Island	Name of an Island	One of the islands around Luang Island which is shorter than the other islands around it
Metafora/Compare	Short, concise, and clear	Do not talk too much	To be simple, clear, concise and short

The results of this study indicate that the exploration of the meaning of the Luang people in building relationships with nature appears in dimensions; self-insight, the meaning of life, changing attitudes, self-commitment, directed activities, and social support. Exploring the meaning of life through these dimensions makes them tend to maintain respect for nature as a life-giving source. The concept of respect here is a responsibility, which will only be meaningful if they are able to manage and protect the earth and place the earth not as an object but as a partner in the sustainability of their lives and the sustainability of natural life.

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**THE RELATIONSHIP BETWEEN MASS MEDIA AND COMMUNICATION
WITH THE PROCESS OF THE DWELLING OF HUNGARIAN IMMIGRANTS
IN THE SOUTH OF BRAZIL**

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Abstract

This work aims to answer the questions of, what is the communication and mass media role in the process of settling down in a new landscape through analysis of the publications and communications in the medium newspapers, ranging the year from 1921 to 1989. The main newspaper this research focuses on is the "O Correio do Povo" which is the main local newspaper of the city of Jaraguá do Sul, also the "Jaraguá: Seminários Nacionalistas" another newspaper that circulated for a few years in the city. Thus, the focus is on reporting and analyzing the newspaper advertisements and reports, to answer the questions of, what is the communication and mass media role in the process of settling down in a new landscape by the Hungarian immigrants in the South of Brazil. Based on archive research, focused on the role of the media in the process of immigration and colonization in Jaraguá do Sul. The timeline range covers the propaganda made for the arrival of Europeans to the south - before 1891 as presented in books -, going through the publications in the local newspapers from 1921 to 1989. Finally, a brief introduction was made about the nowadays publications, reinforcing the role of the newspaper in remembering, which generates questions about its new roles in society under a digital acceleration. The whole analysis brought up also the main values and needs of the community during the first decades, through the portrait of the current in the past, which the newspaper helped to compose. Such aspects will help in the reflection of future analyses on how it was reflected in the local architecture.

Keywords: migration, newspaper, archive research, memory, collective memory.

Disciplina: cultural anthropology

Absztrakt**A TÖMEGMÉDIA ÉS A KOMMUNIKÁCIÓ KAPCSOLATA A MAGYAR BEVÁNDORLÓK DÉL-BRAZÍLIAI LETELEPEDÉSÉNEK FOLYAMATÁBAN**

A tanulmány az 1921 és 1989 között újságokban megjelent kommunikáció és publikációk elemzésén keresztül arra a kérdésre keresi a választ, hogy mi a kommunikáció és a tömegmédiá szerepe az új tájban való letelepedés folyamatában. A kutatás Brazília Jaraguá do Sul városának fő helyi újságjára az "O Correio do Povo"-ra összpontosít, valamint felhasználja a "Jaraguá: Seminarios Nacionalistas" című másik újságot is, melyet néhány évig terjesztettek a városban. A hangsúly az újsághirdetések és riportok ismertetésére és elemzésére helyeződik, annak érdekében, hogy választ kapjunk arra a kérdésre, hogy milyen szerepet játszik a kommunikáció és a tömegmédiá a dél-brazíliai magyar bevándorlók új tájakon való letelepedésének folyamatában. Az archív kutatás alapján betekintés nyerhető a Jaraguá do Sulban lezajló bevándorlás és a kolonizáció folyamatába. A tanulmány az európaiak déli érkezése kapcsán készült 1891-től (a könyvek bemutatása alapján), a helyi újságokban 1921-től 1989-ig megjelent publikációkon keresztül mutatja be a helyi propagandát. Végezetül rövid bemutatás történik a mai kiadványokról, megerősítve az újságok emlékezetben betöltött szerepét, s további kérdéseket felvetve a médiumok társadalomban betöltött új szerepeire vonatkozóan a digitális felgyorsulás idején. Az elemzés felszínre hozta a közösség fő értékeit és igényeit, amelyeket az újság segített megalkotni. Ezek a szempontok segítenek az olyan jövőbeli elemzésekben átgondolásában is, mint például, hogy ez hogyan tükröződött a helyi építészetben.

Kulcsszavak: migráció, újság, archív kutatás, emlékezet, kollektív emlékezet

Diszciplína: kulturális antropológia

Introduction

The process of migration can be understood as geographical movement across international borders (Tsagarousianou, 2020), and the media can play many roles in this process, through propaganda or even as a means of information and connection. This process has been happening for a long time, historically, to and from different places in the world, and for different reasons through time. Florestal (2020) points out that there are many untold stories in the act of departure from one's homeland and arriving in a new world, which has happened millions of times. For that reason, this work focuses on telling some of those stories, related to the immigration of Hungarians to South America, at the end of the 19th century, focusing on

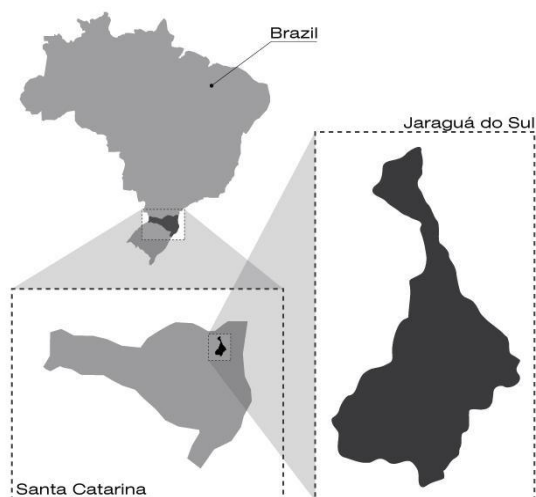
discovering the relationship between communications and the mass media, mainly the newspaper at that time, with the process of dwelling in a completely new landscape, reaching to the present questions surrounding the role of the digital media on remembering and telling these stories, how it can keep empowering the remembering process of the Hungarian descendants.

For Kosa, "emigration represented a natural outcome of those social problems which beset many European countries for long period" (1957, 501.), which made people leave behind their native land to try a new life in a strange country. That is the case of many Hungarian families, which went to Brazil, leaving the Hungarian landscape behind in 1891, looking for what was promised. The main

goal of the Brazilian government at that time was to populate the interior areas with the encouragement arrival of foreign groups, which added to the social movement in Hungary after the abolition of serfdom contributed to this process of migrating from Hungary. According to Boglár (2000), the immigration propaganda was done by shipping companies, "the propaganda promised the Hungarians that in South America, each family would receive, free of charge, a 120-acre plot of land, in addition to equipment, provisions, a dairy cow, chickens and even, who knows, midwives!" (Boglár, 2000, 32.).

Thus, in the last decade of the 19th century, more precisely from 1890 onwards, Hungarian families began to immigrate from the region around the county of Veszprém to the south of Brazil. The Hungarian families settled down in the region that today is the city of Jaraguá do Sul, on the banks of the Jaraguá River, and went through a process of assimilation with Italians, Germans living already there, and later also Polish (Figure 1.).

Figure 1. Location of Jaraguá do Sul, in the South of Brazil. Source: by the author (2022)



This, added to the isolation also because of World War I, when the possibility of

communication ceased, further strengthening the process of assimilation and later, the political institutionalization of the Estado Novo (New State) in Brazil in 1937, in search of the nationalization in the country, made even more strong the loss of the Hungarian language in the daily lives of that immigrant families.

Media and communications practices strongly participate in cultural lived experiences with a big significance between media and the migration process (Hedge, 2020). Those topics have been connected in a wide frame of research for a long time now, under different perspectives, such as historiography, anthropology, sociology, political science, and economy, and so on; and different approaches, including multidisciplinary ones (Hegde, 2016; Chin, 2016; Franz & Silva, 2020; Karim & Al-Rawi, 2018; Leurs, Witteborn & Gajjala, 2020; King & Wood, 2001). This work is again putting two very interdisciplinary fields of study, related to migration and media studies. In this work, it is presented the participation of the media in the whole process of migration of Hungarian families, to identify what is the role of the media, from the first propaganda, offering new lands and animals (Boglár, 2000), until the participation of the creation of the first press in the region (Boglár, 2000), reaching the small advertising publications of Hungarians into the local newspapers (Lopes & Kita, 2012). Finally, reaching to the question surrounding the remembering process, and how digital media nowadays may continue strengthening it.

Methodology

The methodology used for developing this work is mainly archive research, based on the publications and communications through the newspapers, ranging from 1921 to 1989. The newspapers this research will focus on will be "O Correio do Povo", which is the main local newspaper of the city of Jaraguá do Sul, also in "Jaraguá: Seminarios

Nacionalistas" another newspaper that circulated for a few years in the city. In addition, a few books published by researchers and historians in Brazil were consulted to present the historical timeline of the Hungarian families and the relationship between the Hungarians and the press at that time. Thus, the focus is on presenting and analyzing the newspaper advertisements and articles, to answer the question of, what is the communication and mass media role in the process of integration and settling down in a new landscape by the Hungarian immigrants in the South of Brazil, and how it made possible the identification of the main values of those immigrants through the local media, enriching future research that will reflect on architecture as a cultural product. King (2021) brings up the increasing studies related to migration over the years, raising the question under this study, what is the role of media in it? Further, after understanding the role of media in the decision-making about moving from one country to another, creating a relationship with the new homeland, and later the process of remembering it all.

The finds in the newspaper, from 1921 to 1989

To start this discussion, it is important to bring to light concepts and notions, such as media and communication, its history, migration, and memory. All three concepts are closely connected in this work, which focuses on understanding the role of media in settling down the process of Hungarians migrating from Hungary to the South of Brazil. Once this work is based on archival research, as a researcher, it is essential to think about how the movement is remembered and archived by whom and for what purposes (Smets, Leurs, Georgiou, et al., 2020), composing part of the remembering process, tied to the memory, which is based on the "lived past" rather than on the "past incorporated by written history" (Halbwachs, 1992), formed internally to a collectively.

The newspaper is the first and main medium this study is focusing on, later reaching into its achievements and the digital opportunities nowadays. According to Spannenberg and Barros (2016), the press officially arrived in Brazil, with the transfer of the Portuguese Court to the colony in 1808, moving on to its consolidation with the emergence of new periodicals and with the disappearance of many others. At the end of the 19th century, with the change of political regime in Brazil, from a Monarchy to a Republic, there was a favoring of modernization and industrialization, consequently the same happened in the press. In southern Brazil, as there was a large colonization project by European immigrants, Seyferth (2003) points to a certain omission on the part of the State, which meant that the organization of communities was left to the colonists themselves. Thus, due to the strong German influence, the teaching language at the first schools was the German language, and consequently, newspapers were printed also in the German language, "mainly in the emerging urban centers in the colonial areas, but also in the lines and trails of the interior of the colonies" (Seyferth, 2003, 29.).

As previously mentioned in this work, there are many studies connecting the media and migration through time, from different perspectives. The migration movement, of people leaving their home countries at the end of the 19th century, had many reasons. Kosa (1957) presents that from 1850 emigration from Hungary started as a social movement, estimating that in the period from 1880 to 1890, around 22,000 people were leaving the country and this number started to increase. According to information collected on the Jaraguá do Sul municipality's website, the first Hungarian immigrants arrived via the Hannover Ship, reaching Brazil in June of 1891. Many families were on that ship, mostly from the county of Veszprém or its surroundings. The shipping companies made a big propaganda, promising lands, animals, and equipment in South America. After they arrived in the

promised lands, the immigrants, received the land, but it was fulfilled with native forests, and various dangers from nature so far unknown to them, including attacks by animals and native Indians. Majcher, Canuto, and Lopes (2008) described that from a certain point of their journeys, reaching the final destination area of their plots was only possible by foot, due to the lack of roads in the region at that time, such description of the trajectory was published in the newspaper in 1987, though the personal record of a Hungarian immigrant. From that, the immigrants had to open the native forest and start building the first shelters, which later would become their homes. Majcher, Canuto, and Lopes (2008) pointed out that each family bought the lots, and as payment, mostly through labor for local infrastructure, which was absent at the time of their arrival. Such payment should be made within a period of five years, without taxes, "the men worked in opening and building roads" (Majcher, Canuto, & Lopes, 2008, 76.).

Before the main analysis of the publications, it should be highlighted a few examples of the personal relationship of the Hungarian with the press media in the region of Santa Catarina. Boglár (2000) points to an important relationship between the Hungarians and the Joinville press, the neighboring city of Jaraguá do Sul, where a big colonization agency was located. In the year 2000, according to Boglár, the current director of one of the most prestigious newspapers, the so-called "*A Notícia*", was the Hungarian Géza Kapudi, who had already published several reports about the Hungarians of the region. The mentioned publications were not possible to locate for analysis in this work. Another connection of the Hungarians with the press in southern Brazil, also in Joinville, is that the Hungarian Ede Schwartz, who emigrated from Hungary to Brazil in 1891, founded the "*Jornal de Joinville*", which in 2000 kept being managed by his family. It is also important to point out the books

written by Lénard Sándor, a Hungarian who lived in the city of Dona Emma and published a few books, mainly in the German language, describing the cultural anthropological aspects of the different immigrant groups and the built environment of Dona Emma. Those examples enhance the media in the lives of the Hungarian immigrants in the south of Brazil.

The main newspaper this research is focused on is the local one called *O Correio do Povo*, which since 1921 already brought a lot of news from Hungary, as observed in the newspaper records, through the digital archive "Hemeriteca Digital Catarinenese". From the first newspaper publications analyzed, it is possible to affirm the newspaper worked as a communication means for the families to reinforce their presence in the new lands, this role worked for a long time until the change and receives the role of remembering. Based on the analysis it was subcategorized the main topics presented in the publications, from the celebrations and local festivals, advertisements of the commercial houses and their products, news from Hungary and Europa at that time, finally reaching the change of the newspaper role to the process of remembering.

Celebrations and local festivals

Majcher, Canuto, and Lopes (2008) point out that the newspaper "*O Correio do Povo*" was collaborating with the Hungarian community, by sharing advertisements of festivals of the church or the ones held to raise funds for the local schools. In the newspaper record, the first one identified was in issue number 17 of 1921 already featured advertisements in German for the main Hungarian celebration, called Kirytag, possibly connected to the Hungarian Búcsú. In the following edition, number 18, a small article brings up the memory of the flavors of the Hungarian dishes prepared for this event, such as the paprika and the strudel, also in the German language. In the following years, the advertisement for the church festival kept

appearing, yearly, including reports addressing the number of people and tourists present in the celebration, such as the one in issue number 832, relating the Saint Stephen Church community festival, emphasizing that this community was one of the largest in the district (Figure 2.).

Figure 2. O Correio do Povo, Issues No. 17, 18 and 832, from 1921 and 1926. Source: Hemeroteca Digital Catarinense

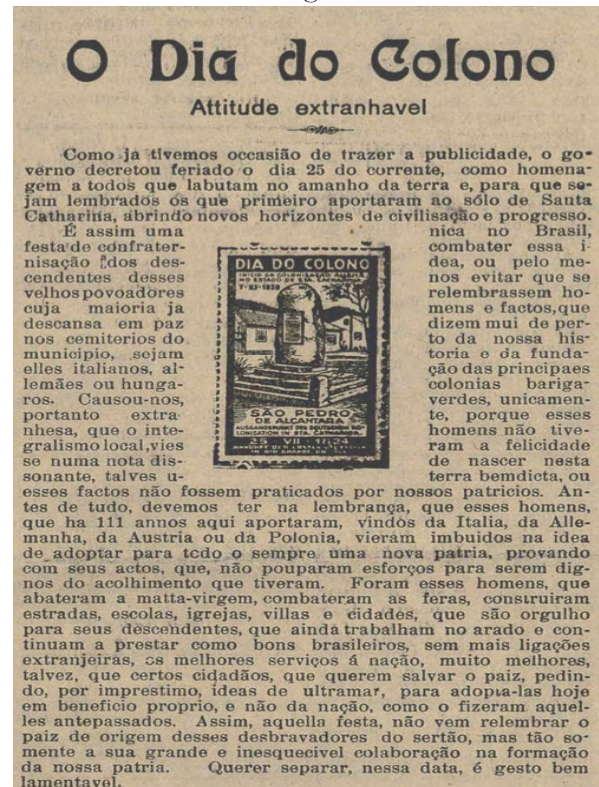


In 1935, issue number 791, published an article about settler's day, which is celebrated on July 25, and became a public holiday in the state. The article pays homage to the immigrants, as a way of opposing the political party's note that was against the idea of such a celebration. Hungarian immigrants are mentioned along with the others, Germans and Italians.

We must bear in mind that these men, who landed here 111 years ago, coming from Italy, Germany, Austria, or Poland, came imbued with the idea of adopting a new homeland forever and ever, proving with their actions that they spared no effort to be worthy of the welcome they received. It was these men who cut down the virgin forest, fought the wild beasts, and built roads, schools, churches, towns, and cities, which are the pride of their descendants, who still work at the plow, and continue to like good

Brazilians, without foreign connections, to provide the best services to the nation. (Direct translation of O Correio do Povo, 1935, Hemeroteca Digital Catarinense) (Figure 3).

Figure 3. O Correio do Povo, Issue No. 791, of July 13, 1935. Source: Hemeroteca Digital Catarinense



Until 1937 it was possible to see that a part of the newspaper was still being printed in the German language, but due to the political situation in Brazil, and the creation of the Estado Novo (New State), the newspaper started to be only in the Portuguese language. The advertisements related to the festivals of the church also kept appearing every year in the newspaper, together with some festivities to raise money for the local schools (Figure 4.).

Figure 4. O Correio do Povo, Issues No. 940 of 1938, and No. 1856 of 1955. Source: Hemeroteca Digital Catarinense

Caixa Escolar
«Getulio Vargas»

Assignado pelos srs. Pedro Perfeito, Inacio Salomon, Clemente Barato e Francisco Ersching, membros da comissão organizadora da festa pró Caixa Escolar que tomou o nome do snr. Presidente da Republica, recebemos o seguinte convite:

Illmo. Sr. — Temos a stuidia honra de convidar V.S. para assistir a festa-civico-recreativa, a realizar-se na escola de Garibaldi, a 24 do corrente, em beneficio da Caixa Escolar «Getulio Vargas».

Oratos pela gentileza.

Festa de São Estevão

Realizar-se-á em Garibaldi, no dia 11 de Setembro a tradicional FESTA DE SÃO ESTEVÃO.

Haverá: Galinha assada, churrasco, doces, bebidas, café e o afamado "Strudel".

A festa será animada por ótima musica.

A COMISSÃO

Figure 5. O Correio do Povo, Issue No. 964, of January 14, 1939. Source: Hemeroteca Digital Catarinense

Cinema Central

DOMINGO — Dia 15 — Em DUAS GRANDIOSAS FUNCÇÕES, ás 3,30 da tarde e 8,30 da noite

1. Um lindo «Natural» nacional. 2. Novidades Internacionaes - Ufa 3. Marika Roeck e Paul Kemp em

Rapsodia Hungara

Uma das mais lindas operetas da Ufa. Fallada em allemão com letreiros em portuguez.

Issue 964, of 1939, presents an advertisement for the presentation of the Hungarian Rhapsody, as an operetta film from Ufa, in the movies of the city, "spoken in German, with inscriptions in Portuguese" (Direct translation of O Correio do Povo, 1939, Hemeroteca Digital Catarinense). In this way, it is possible to observe that the culture of the Hungarians strongly represented thought to music and festivities, and culinary (Figure 5).

Commercial houses advertisements

The commercial houses used the newspaper to share advertisements about their products but also

represented the physical aspect connecting the Hungarian families at that time. The commercial houses were the main points that served as a centrality in the small colonies. Also called *Gescheft* in German, such places functioned as small warehouses. It was there, one of the centers that made communication possible, such as sending and receiving letters, and the destination points of the newspaper. As at the time, there was no radio, immigrants went to the commercial house every week to get the news and get informed (Majcher, Canuto, & Lopes, 2008). According to Lopes and Kita (2013), many of the commercial houses, such

as the Wolf house and the Fischer house, maintained nearby halls where dances and parties were held, as well as a place for meetings where local needs were debated, such as creations by schools and associations.

According to Lopes and Kita (2012), Francisco Fisher had a commercial house in the region since 1900. The establishment used to sell a variety of products, including some used in typical Hungarian cuisine. The commercial house appeared in the advertisement for the establishment highlighting the paprika, published in 1927 (Figure 6). In the 1960s, issue number 2234 publishes an advertisement on the front page of the newspaper announcing the death of the Hungarian Francisco Fischer who since 1900 worked as a merchant in the city of Jaraguá do Sul and in the Hungarian community. Another important commercial house was the one of George Wolf, built in 1896, which will appear in the newspaper as a memory, in the further of this analysis.

Figure 6. *O Correio do Povo*, Issue No. 412, of April 9, 1927. Source: Hemeroteca Digital Catarinense



News from Hungary and the presence of Hungarian authorities in the city

During the first decades ranging this analysis, the newspaper was publishing many articles presenting the news related to the situation in Europe and Hungary at that time, which kept appearing very strongly until the decade of 50`s when they became less often than before. During the 1970s, a few

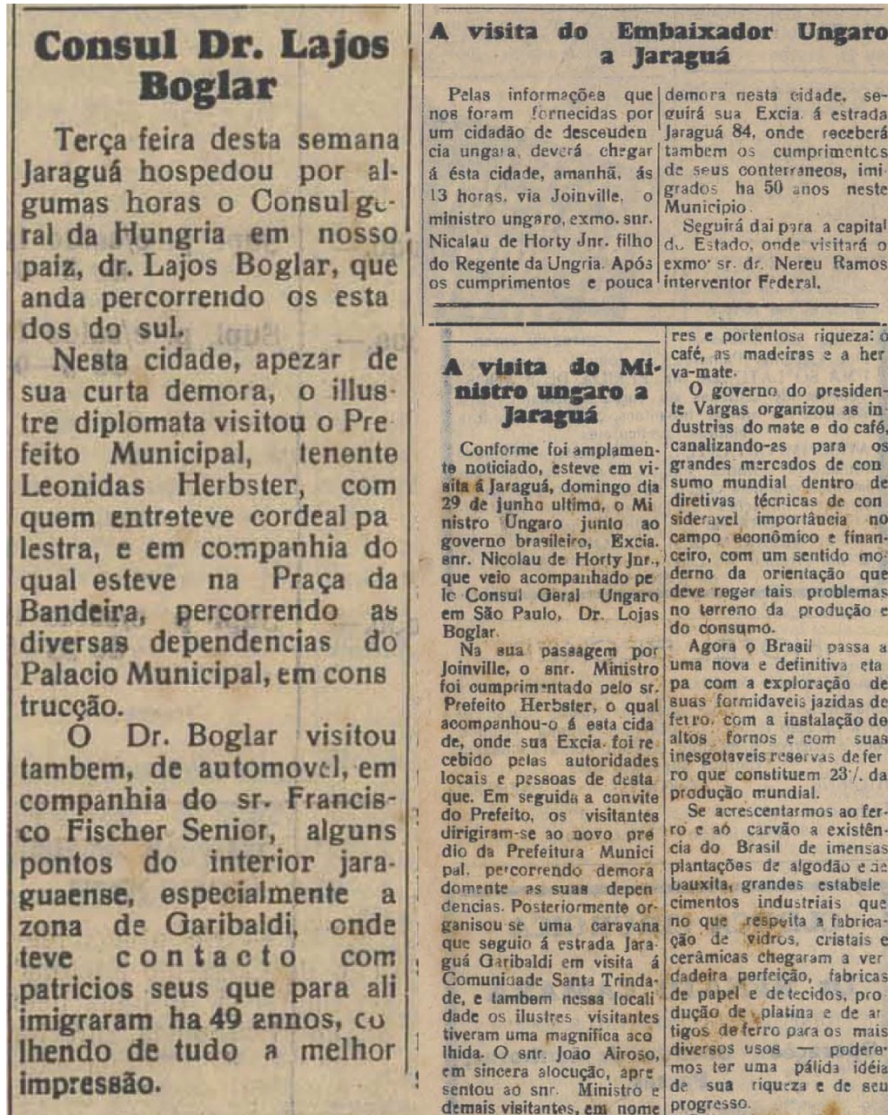
pieces of news related to Hungary were identified, such as the news of the return of the crown to its country of origin, in January 1978, issue 2969. Finally, in the 1980s almost no news of Hungary was identified.

The Hungarian community in the South of Brazil maintained communication with the Hungarian consulate in Brazil at that time, as well as with authorities in Hungary (Lopes & Kita, 2013). In the year 1940, the city received the visit of the Hungarian Consul in Brazil at the time, Lajos Boglár, who visited the Garibaldi region in Jaraguá do Sul, where the Hungarian immigrants settled. Issue 1052 features an article about the visit (Figure 7.). The following year, in 1941, the city also receives a visit from Miklós Horthy Jr., who for a time was the Hungarian ambassador to Brazil. The newspaper recorded the visit, edition 1083 published the announcement of the visit, and edition number 1085 published a complete report on the visit.

The beginning of the remembering process

In the beginning, the newspaper was presenting advertisements about commercial houses, church and school festivals, and engagement, marriage, and obituary announcements, but also many articles presenting the news related to the situation in Europe and Hungary at that time, as early described. The first article identified that started to connect with the change of the role of the newspaper was in issues number 1226 and number 1227 of the year 1944 presenting the history of Jaraguá do Sul, where the Hungarians are mentioned as one of the ethnicities that settled in the rural areas of the city. From that, small articles started to be published mentioning the Hungarian participation in the colonization process, such as in the '60s, in edition 2443, an article by Emilio da Silva entitled "Hungarian Colony 1886-1889", tells the story of the Hungarian immigrants who arrived in the south of Brazil at that time.

Figure 7. *O Correio do Povo*, Issues No. 1052 1940, No. 1083 and 1085 of 1941. Source: Hemeroteca Digital Catarinense



The article also presents the names of the first immigrants. Finally, issue number 2461 publishes parts of the Diary of Frei Lucíneo, which reports the joy of the Hungarians in seeing a priest in the region for the first time, in 1892. This, from the end of the decade 1980, the remembering aspect started to be stronger.

In some articles dealing with commemorative dates such as the city's anniversary or the settler's day, the Hungarians who migrated to Jaraguá do Sul at the end of the 19th century are mentioned as participants in the city's construction process. Finally, in 1987, a sequence of 5 articles published in the newspaper *O Correio do Povo* began (issues

3447, 3448, 3449, 3450, and 3451), with the title "The Hungarian Presence in Jaraguá" (Figure 8., Figure 9.).

This is due to the discovery of documents with historical records of the first Hungarian immigrants in Jaraguá do Sul. In these documents, one of the immigrants tells how the trajectory from Hungary

was until they finally arrived in the lands where they settled down in Jaraguá do Sul, a path that included train, ship, boat, and even the opening of the forest by foot.

The newspaper also presents historical records of the number of immigrants arriving at that time by ethnicity.

Figure 8. O Correio do Povo, Issue No. 3447, of July 25, 1987. Source: Hemeroteca Digital Catarinense

De se imaginar as dificuldades por que passaram para se estabelecer em Jaraguá. Inicialmente fizeram suas compras em Itapocuzinho, por via fluvial, partindo do ponto até então conhecido por JARAGUÁ 84, pelo rio Jaraguá e depois pelo rio Itapocu até o rio Itapocuzinho, onde se achava instalada uma filial de Gottlieb Stein.

Quem se der ao serviço de correr ao mapa de Jaraguá do Sul haverá de constatar que era uma verdadeira odisséia circular por tantos rios que deveriam possuir grandes volumes de água ao contrário do que ocorre atualmente, onde os rios mostram em certos lugares o leito pedregoso dos outros rios navegáveis.

O governo catarinense tinha interesse nessa colonização. O dr. Hercílio Pedro da Luz era o chefe da imigração em

A presença húngara em Jaraguá

(2.º artigo de uma série de cinco)

Blumenuau e o dr. José Bonifácio era o médico. Franz Fischer confidencia em suas anotações, que ficou pouco tempo com os seus pais indo trabalhar com o dr. Cunha, em Itajaí, tratando os cavalos do médico, ao mesmo tempo que tinha interesse em aprender o português. Conduzia correspondência a diversos destinos.

Tomou parte ativa na Revolução de 1893, entre legalistas e federalistas, tendo sido estafeta para levar comunicações entre os srs. Hercílio Pedro da Luz, dr. José B. da Cunha, Francisco Margarida, dr. Abri, Santos Lustosa, dr. Lauro Severiano Mueller e outras personalidades, inclusive Paulo Ramos, que os revolucionários esta-

vam cacando, tendo-se refugiado com o sr. Donner, em Limbó. Os revolucionários, contudo, seguiram adiante, com destino de Rio Cerro e Jaraguá (Itapocu), juntando-se a outros vindos de Joinville.

Após deixar o emprego em casa do dr. Cunha voltou para trabalhar como caixeiro no comerciante BAI, em Jaraguá 84. Quando Bai vendeu o seu negócio para o sr. Fossberg, continuou com este. Mas não demorou em deixar o emprego, para empregar-se na casa de José Porto, em Itapocu, onde trabalhou 3 meses gratuitamente, só para aprender melhor ainda o português.

José Porto era pai de Venâncio da Silva Porto que estava em Itajaí a-

passou a trabalhar na firma Gottlieb Stein, em Jaraguá à margem do rio Itapocu.

Nessa firma conheceu a sua futura esposa Hermine Fredrike Rauchs, contratando o casamento em 1899 e casando-se em 18.08.1900 e gerenciando a filial de João Gottlieb Stein, situado em Jaraguá 84, adquirendo em 1901 a filial e trabalhando o negócio por conta própria.

No período de 1892 a 1900 fez inúmeros conhecimentos, tais como o Cel. Feddersen, Probst Knoblauch, Schrader, Koehler, de Blumenuau, o dr. Francisco Tavares da Cunha Meilo, Cezar Pereira de Souza e muitas outras personalidades de Joinville, como o dr. Abdon Batista e dr. Marinho Lobo e os já radicados em Jaraguá: Marcos, Henrique, Urbano, João Tobias, Domingos e Emilio Rosa, João Lourenço, Karl Eggert, Família Borba Calmon, José Bento e Chico Bento.

Eugênio Victor Schmückel

Compre seus materiais de construção na

Arte Laje Jaraguá

VENHA APROVEITAR A PROMOÇÃO DE LANÇAMENTO DO PISO TÉRMICO "FORMIPISO".

Figure 9. O Correio do Povo, Issue No. 3449, of August 8, 1987. Source: Hemeroteca Digital Catarinense

Franz Fischer teria sido um dos húngaros entre outros ilustres que se destacaram entre as levas de candidatos a ocupação das terras então demarcadas na localidade hoje conhecida por Garibaldi. Note-se que todo o atual município de Jaraguá do Sul é montanhoso, à exceção dos vales dos rios Itapocu e Jaraguá. Cartógrafo Waldir Fausto Gil, do Departamento Estadual de Estatística, quase no final da década de 30 elaborou mapas da região Sul que é conhecida por Serra Garibaldi e a colonização se deu de fora para dentro do atual município, via rio Ada, e Rodeio, situando-se ao longo do segundo maior rio do então sertão do Itapocu, formado lá nas cabeceiras pelos rios Garibaldi, Corina, Jaraguá, Rodrigues, Fausta, Casilda, Alice Húngaros Cascata Pedras, Budal, Stulzer, Cerro, Pedras Brancas, Stingham e Motha. Daí a razão porque os lotes demarcados, os seus números aumentavam a medida que se

A presença húngara em Jaraguá

(3.º artigo de uma série de cinco)

aproximavam de Rio Cerro. Atento ao movimento de pessoas que vinham ocupando os espaços demarcados, de próprio punho, a lápis, Franz Fischer deixou anotado esta interessante estatística da entrada de húngaros, alemães, italianos, como se vê adiante: imigraram 230 húngaros em 1891; 149, em 1892; 6, em 1893; 156, em 1895 e 165, em 1896, totalizando 706 pessoas. Alemães entraram 561 pessoas, em 1891; 91, em 1892 e 82, em 1893, com um total de 734. Uma anotação parece completar a informação quanto aos alemães, pois dá como sendo a maioria formada por teuto-brasileiros. A esse respeito já se manifestou Walter Fernando Piazza em seu interessante trabalho A COLONIZAÇÃO DE SANTA CATARINA, dando à Colônia Jaraguá como sendo de outra forma de ocupação da terra,

estabelecendo entendimento diferente entre colonização e povoamento o sentido que para tais casos lhe atribuem obras de língua inglesa. Dentre as anotações feitas por Franz Fischer está, também, a que se refere à imigração italiana que se deu no ano de 1892, com a entrada de 116 pessoas.

Fotos ainda existentes com as famílias imigrantes húngaras dão às gerações mais recentes a idéia de como viviam, quando se tinha nas intenções de criar o primeiro quadro urbano, nas terras de Ninow, na localidade de São Estevão, seguido dos terrenos pertencentes às Comunidades Católica e Evangélica e, na entrada do Ribeirão Casilda a imponente edificação de Georg Wrofl, onde se realizavam os tradicionais encontros dos moradores que ali compareciam em traje completo, no mais

Karsten; 87 de Joseph Scheuer; 88, de Emmerich Ruysam; 89, de Johan Butschardt; Franz Fischer; 90, de Joseph Bankhardt; 91, de Johan Nepomuceno Leutprecht; 92, de Anton Eichinger; 93, de Joseph Krumecker; 94, de Johan Krumecker; 95, de Johan Panstein; 96, de Johan Vagel; 97, de Gabriel Lestovics; no **Ribeirão dos Húngaros**: 01-b, de Johan Keller; 01, de Johan Salomon; 02, de Valentin Leitold; 03, de Johan Harvel; 04, do Prof. Stephan Skockle; 05, de Andreas Kramel; 06, de Joseph Steterlein; Joseph Ernhofer, Johan Kiss, Vva. Anna Kirsthen, Johan Barkhardt, Franz Schwarz e Lajos Todt; no **Ribeirão das Pedras**: Gabriel Mareta, Michael Gatscher, Florian Spies, Joseph Leitoldt, Joseph Zann, Joseph Bichel, Michael Leithold, Franz Steterlein Sr., Joseph Bokor Ferdinand Keller, José Heiter, Joseph Koch, Joseph Schogor e Emmerich Stenger.

Eugênio Victor Schmückel

Clínica Veterinária

Memory, the process of remembering and witnessing can be pointed out as straightening the construction of collective memory (Smets, Leurs, Georgiou, et al., 2020). In this sense, it is possible to understand the newspaper as a *lieux de memoire* (Nora, 1989). The newspaper can provoke feelings that transcend materiality, articulating the collective memory of a determined group, working not only as a communication mean but going further. According to the words of Nora (1989), it is possible to explain, as we are living through the acceleration of history, we keep producing a past that no longer exists. The 'acceleration of history' awakens the need to hold on to vestiges and traces of the past, the residual continuity, as a way of opposing contemporary acceleration. Although Nora does not mention newspapers in his writing, this work takes the newspaper as one of the materializations of memory (Maduell, 2015), as it has all the three elements described by the author - materiality, symbolism, and functionality.

Lieux de memoire is simple and ambiguous, natural and artificial, at once immediately available in concrete sensual experience and susceptible to the most abstract elaboration. Indeed, they are lieux in three senses of the word - material, symbolic, and functional. Even an apparently purely material site, like an archive, becomes a lieu de memoire only if the imagination invests it with a symbolic aura (Nora, 1989, 18.).

Thus, as interpreted by Maduell through the words of Nora (1957) and Barbosa (2008), the residual continuity of the past in the present can be translated into the present interpretation through a chain of meanings. On the other hand, when we placed ourselves into the present moment of the past, the newspaper had also an important role, from the point of view of the immigrant, inserted into a new landscape. The newspaper emphasizes the current in its routine, in this way, becoming a means of helping the immigrant in his rooting

process, as well as maintaining his relationships with the homeland, and the many changes that the whole process of dwelling in the new contains. "Media are implicated in how people maintain relationships, produce subjectivities, and build communities under a range of conditions of mobility (and immobility)" (Olivieri, 2020).

From the decade of the 1980s, the role of the newspaper turned into an informative medium focused on the act of remembering and strengthening the collective memory. Later on, around the year 2000, the newspaper started a series of reports entitled "Garibalde-JGS District of Veszprém", inserted in the column called Memory (Figure 10.). With 48 published articles that year, Eugenio Victor Schmoekel expose the history and the memories of the Hungarian immigrants who occupied the lands in the region today called Garibaldi, in the city of Jaraguá do Sul. In this way, bringing back a whole history from the past together with documentation and photographs

The author who signed as Fritz von Jaraguá, begins a series of reports that tell a little about the history of Hungarian immigrants, such stories are mixed with the stories of other immigrants and with the development of the region called Garibaldi, which contributed to the development of Jaraguá do Sul. "I am in the month of January 2000, when I begin to publish the memories that I have accumulated about a large strip of land in Jaragua that the past has agreed to call Garibaldi, heavily colonized by Hungarian immigrants" (Fritz von Jaraguá in O Correio do Povo, 2000, Issue No. 4253). In the same publication, the author emphasizes and repeats a few times the role of the newspaper in showing solidarity with Hungarians and their descendants. In the development of publications, it is approached from the history and data of Hungary, through historical data of Brazil and the region of Santa Catarina.

Figure 10. The first 3 articles were entitled "Garibaldi-JGS District of Veszprém" from the issues in 2000. Source: Hemeroteca Digital Catarinens

EMÓRIAS Sábado, 15 de janeiro de 2000
por Eugénio Victor Schmückel

REMINISCÊNCIAS

Garibaldi — JGS Distrito de Veszprém (1)

Estou no mês de janeiro de 2000, quando iniciando a publicação das lembranças que acumulei sobre uma larga faixa de terra jaraguense que o passado convencionou chamar de Garibaldi, fortemente colonizada por imigrantes húngaros. Hoje só restam daqueles desbravadores do território catarinense os seus descendentes de 2^a, 3^a e quem sabe de 4^a gerações, que começam a resgatar a memória daqueles primeiros exploradores da selva brasileira que ainda hoje continua sendo uma região onde se trabalha a terra, que produz as mais variadas culturas, com criações para completar o quadro e experimentar adaptar-se ao processo de industrialização, que é a vocação deste canhão catarinense.

É-me muito grato iniciar estas reminiscências, que respondem positivamente ao meu estado de espírito, pois, quando vim para Jaraguá, deixando a Curitiba de minha infância e adolescência, encontrei descendentes de húngaros que me estimularam a aqui permanecer, hoje completando 52 anos, e, posteriormente confiavam a mim os seus registros contábeis para o bom funcionamento do comércio estabelecido, ou para receber os "velhos colonos" como se chamavam e recorram ao meu escritório, aí na Marechal, nº 122/130, para uma *Auskunft* — uma informação para suas dúvidas de como resolver uma questão de divisas —, ou para redigir um *Kontrakt*, que precisava ser feito com minúsculas para que pudessem confiar, além das testemunhas, onde invariavelmente também assinava como um sinal de garantia. Muitas vezes eu deixava de almoçar para atender os meus clientes húngares, porque não podiam perder tempo com as plantações e criações e, mesmo porque, sempre tinham que dar um empurrãozinho no Oswaldo Bledorn, minorista e dono do ônibus que os trazia e levava e não tinha lugar para estacionar, geralmente parava

na pensão do húngarês Emmerich Ruysam, que depois passava para outros proprietários, entre eles o Pulli-Bar, que foi quando fechado, aí na Marechal, ao lado da Praça Angelo Piazzera, onde ficava a Prefeitura, a Câmara Municipal, os Cartórios e Registro Civil e Foro da Comarca de Jaraguá do Sul.

Tempos depois, em 27-4-1957, falece subitamente Arthur Müller, a quem estava ligado por uma sociedade e, na falta de quem pudesse o substituir, acabei como "herdeiro" de todos cômodos e incêndios, inclusive a área política a que estava novo. Os acontecimentos acabaram por me enfiar, saindo como candidato a vereador e a deputado estadual, com o apoio dos amigos do falecido, onde entravam familiares de Wolf Gascho, Leinert, Steinmayer, Nienow, Oestreich, Milbratz, Westphal, Leibhold e Hein, só para citar estes, sem desmerecer aqueles milhares de minha afecção e respeito. Dos garibaldianos recebia farta votação que me mantiveram como vereador por 11 anos, defendendo os seus legítimos interesses. Quando me elegi como 1^o vice-prefeito na chapa de meu compadre Hans Gerhard Mayer, em 1970, no exercício do cargo de prefeito, não esqueci a região de Garibaldi, alargando a estrada e macadamizando-a, e muito contribuí com campanhas na eletrificação da região, possibilitando melhorias e conforto àquelas famílias que tão bravamente lutavam para o progresso de Jaraguá do Sul. O **CORREIO DO POVO** nunca negou solidariedade aos anseios dos húngaros de nascimento e seus descendentes.

Espero não decepcioná-los com o meu trabalho de pesquisa que resgata a memória daquela região. E com humildade aceito críticas e de coração recebo o concurso de dados novos que garantam maior fidelidade histórica, que já está dado em minha vida progressa a Francisco José, no Império Austro-Húngaro. (Fritz von Jaraguá)



A foto mostra a Hungria dos dias de hoje — o mapa do Bureau Turístico

JARAGUÁ DO SUL, 29 DE JANEIRO DE 2000

REMINISCÊNCIAS

Garibaldi-JGS — Distrito de Veszprém (002)

Falava no começo desta apresentação do Império Austro-Húngaro, o que me leva a lembrar, naqueles tempos de 1948, quando compreca às festas do *Kyriag*, em Santo Estêvão e Santa Cruz. Para aquelas senhoras de idade que ali compareciam, após a missa, reuniam-se defronte à igreja e eu me metia no meio delas para conhecer um pouco melhor o razião de se trajarem e, ao falar em Franz Josef, elas se referiam com muito respeito e ao mesmo tempo com carinho, como se fosse, como foi, um líder daqueles povos que se tinham emigrado para sobreviver.

Hoje a gente sabe a razão dessa quase veneração pelo pai maior, porque viveram aqueles tempos e, mesmo atravessando o Atlântico para se enfiar na selva brasileira, encontravam ainda tempo de dar graças a Deus e lembrar do que ficou em suas memórias, e, onde logicamente apreciava a figura principal, na pessoa do imperador.

Se percorreremos o passado, vamos encontrar a Áustria se destacando historicamente como um dos maiores polos culturais da Europa, localizada no centro do continente europeu, sem saída para o mar, importante ponto de ligação entre o ocidente europeu e o antigo bloco comunista.

Hoje, 2/3 do território é ocupado pela Cordilheira dos Alpes, tendo no Norte o fértil vale do Rio Danúbio, onde se desenvolve a agricultura. Cerca de 98% da população austríaca é de origem germânica e língua alemã. Os restantes 2% pertencem a grupos étnicos de croatas no Leste do país e eslovacos (no Sul). Em 1995, aderiu à União Europeia e a Áustria rompe 40 anos de isolamento.

Fatos históricos mandam dizer que, ocupada na antiguidade por celtas, a região era conquistada pelos romanos em 15 a.C. Com a designação do Império Romano no século V, o território é invadido por sucessivos povos bárbaros: vândalos, godos, hunos, lombardos e ávaros. Depois de breve estabilidade sob o comando do imperador franco

Carlos Magno, a disputa entre os nobres germânicos leva à criação do Ducado da Áustria, em 1156. No século 15, os Habsburgos tornam-se monarcas do Sacro Império Romano-Germânico tendo a Áustria como centro. Os domínios austríacos expandem-se até o século 18. As guerras com a França revolucionária, entre 1791 e 1814, provocam a perda de territórios e selam o fim do Sacro Império Romano-Germânico.

A política de restauração contribui para o fortalecimento do Império Austríaco. Ao lado da Prússia, o país torna-se a maior potência da Confederação Germânica. Com o chanceler Klemens Metternich, no período de 1809 a 1848, conhece o desenvolvimento industrial. Em 1848, a onda revolucionária liberal e nacionalista derruba Metternich.

Sob o domínio do imperador Francisco José — o Franz Josef, das senhoras idosas de Garibaldi-JGS — Distrito de Veszprém —, no período 1848 a 1916, a Áustria é expulsa da Confederação Germânica.

O processo de unificação da Itália e da Alemanha enfraquece o país, que, em 1867, se une à Hungria para formar o Império Austro-Húngaro, com uma política interna autônoma, mas com um soberano e política externa, financeira e militar comuns. Diferentes nacionalidades compõem a população: alemã, húngara, italiana, checa, croata, eslovaca, sérvia, lituana e eslava.

Em 28-6-1914, o arquiduque Francisco Ferdinando é assassinado por um estudante sérvio, o que leva à guerra contra a sérvia tendo início a 1^a Guerra Mundial. Com as alianças militares que se formam, Áustria, Alemanha e Itália (formam a Aliança) enfrentam a Rússia, França e Inglaterra. A derrota em 1918 leva à dissolução do vasto Império dos Habsburgos e à proclamação da República. Cedem-se territórios para a Itália e reconhecimento da independência da Hungria, Checoslováquia, Polónia e Jugoslávia. (Fritz von Jaraguá)

Húngaros e descendentes numa cerimônia cívica, no dia 25-7-35, em Garibaldi. Os sentados, o 3^o da esquerda é Georg Wolf



JARAGUÁ DO SUL, 5 DE FEVEREIRO DE 2000

REMINISCÊNCIAS

Garibaldi-JGS — Distrito de Veszprém (003)

A Hungria ocupa a maior parte da planície húngara, no Centro-sul da Europa, delimitada a Leste pelos Alpes e a Oeste pelos montes Cárpatos. O Rio Danúbio atravessa o país de Norte a Sul e divide sua capital em *Buda* (parte alta) e *Peste* (parte baixa).

Budapeste abriga palácios, museus e construções monumentais que testemunham sua importância no passado como a "segunda capital" do vasto Império Austro-Húngaro. Na recente visita que Eggon João da Silva fez daquele país (sua progenitora era de descendência húngara), tive a oportunidade de manusear vasta bibliografia e fotos inimitáveis para quem não conhece a terra dos húngaros que se fixaram em Jaraguá, na região de Garibaldi.

O idioma nacional não tem parentesco com os demais falados no continente.

Bastante industrializada, a Hungria tem um dos mais elevados padrões de vida do Leste europeu. Aproximadamente 94% da população é servida por saneamento básico e a taxa de analfabetismo é zero. Comunista por 40 anos, o estado enfrenta hoje as dificuldades da transição para a economia de mercado, entre elas o desemprego, em torno de 10%.

Historicamente falando, a Hungria é formada por descendentes dos magyares, cavaleiros

orimados das margens do Rio Volga. No século 9, eles expulsam eslavos germânicos. Fundam um reino e convertem-se ao cristianismo no século 10, sob o reinado de Estêvão I. O país perde parte de seu território para os turcos-otomanos em 1526. Os invasores são expulsos no século 15 quando a Hungria é anexada ao Império Austríaco pelos Habsburgos. Em 1867 passa a fazer parte do Império Austro-Húngaro.

No final do século 19, os húngaros tornam-se minoria em seu próprio estado, com intensa imigração de romenos no Leste e de eslovacos no Norte.

Com a derrota do Império Austro-Húngaro na 1^a Guerra Mundial, a Hungria é desmembrada e perde territórios para Romênia, Jugoslávia e Checoslováquia.

O país passa uma fase de instabilidade depois da guerra. Em 1919, Bela Kun instaura um regime comunista que dura quatro meses. Em 1920 é restaurada a Monarquia. A Hungria se alia à Alemanha na 2^a Guerra Mundial e recupera parte dos territórios perdidos. Em 1944, a URSS expulsa os nazistas e passa a ocupar a Hungria, que volta a ter as fronteiras de 1918.

A transformação do país em área de influência soviética ocorre de maneira gradual. Em 1946 é eleito um presidente não comunista, Zoltán Tildy, mas o poder de fato é exercido

pelos ocupantes soviéticos. Os comunistas vencem as eleições de 1947 (com 22,7% dos votos) e, no ano seguinte, obrigam os social-democratas à fusão dos dois partidos. O comunismo é oficializado em 1949, sob a liderança de Mátyás Rákosi, que elimina brutalmente a oposição. Com a morte do ditador soviético Josef Stálin, em 1953, Rákosi é substituído por Imre Nagy, de linha mais moderada. Nagy tenta uma abertura política e é destituído pela ala dura do Partido Comunista húngaro em 1955. Em outubro do ano seguinte, uma rebelião popular apoiada pelo Exército reconduz Nagy ao poder. O novo governo de coalizão, com não comunistas, proclama a neutralidade da Hungria, extingue a censura, abre as fronteiras e retira o país do Pacto de Varsóvia. Nova invasão em 1956 e Nagy é preso e executado. János Kádár, entre 1956 e 1988, garante estabilidade e crescimento. Verifica-se a abertura da Hungria que se acelera em 1989, impulsionada por gigantescas manifestações. Em janeiro o Parlamento pronuncia-se a favor da liberdade partidária. Nagy é "reabilitado" com a renúncia de 300 mil pessoas. Pedese maior autonomia às minorias húngaras e 800 mil ciganos da Hungria ganham um órgão legislativo autônomo, eleito em abril/95. (Fritz von Jaraguá)



Foto que mostra a visita do ministro húngaro dr. Nicolau de Horthy Jr., acompanhado do cônsul dr. Lejti Boglár, etc. nota no **CORREIO DO POVO**, ed. 1.085, capa, de 12-7-1941

Among the reports, it is important to highlight some information, as well as mentioned the estimated number of people and the year of their arrival in Jaraguá do Sul. Such estimates come from personal notes of Franz Fischer estimating: 230 Hungarians arrived in 1891, 149 Hungarians arrived in 1892, 6 Hungarians arrived in 1893, 156 Hungarians arrived in 1895 and 165 Hungarians arrived in 1896, summing a total of 706 people. In the year 2000, Fritz von Jaraguá estimated that

more than 1,500 people declared themselves of Hungarian descent.

Each of the reports in the newspaper that year was accompanied by images of houses, churches, maps, and of Hungarian families.

One of the observations regarding the architectural style of the buildings is that the author links the half-timbered architecture with that used by Hungarian families on several occasions (Figure 11).

Figure 11. Images of some buildings from the articles "Garibalde-JGS District of Veszprém" from the issues in 2000.
Source: Hemeroteca Digital Catarinense



After the '90s, a column called "History in Photographs" emerges, which remains active until the present. Photographs and even old newspaper covers are published, further highlighting the role of the archives and the newspaper as a source of bringing out the collective memory, but also as a very important source that portrays the current aspects of the past.

As an example, in the year 2021, the newspaper

brings the page of a newspaper column (Figure 12.).

"History in Photographs" of an issue from 1999, with photographs of the Wolf house, a commercial house, and a ball saloon for the community of Hungarian descendants at that time, located in Garibaldi. This publication can be seen as a memory of memory from the past, reinforcing the remembering role of the newspaper.

Figure 12. O Correio do Povo, of September 14, 2021. Source: The author (2021)



Terça-feira, 14 de setembro de 2021 **3**

MEMÓRIA OCP
Uma viagem no tempo.

Nelson Pereira,
Conselheiro OCP

nelson@ocpnews.com.br

Caro leitor, vamos a mais uma viagem ao tempo? O OCP publicava na página 1 do seu suplemento "História, Fatos e Tradição," daquela edição nº 4.214 de 11/08/99, um importante resgate histórico, feito pelo historiador e colunista Egon Jagnow, mostrando como era o nosso comércio no início do século 20. Desfrute dessa nostálgica viagem. Atualmente, todo o acervo histórico do jornal, desde 1919, encontra-se em processo de digitalização. Oportunamente poderá ser acessado pela comunidade.



Cassuli
ADVOCACIA E CONSULTORIA
OAB/SC - 397.99

História, Fatos e Tradição

CORREIO DO POVO
Quarta-feira,
11 de agosto de 1999

História em Fotos

Por Egon Jagnow

No começo do século 20, os comércios mais fortes da região de Jaraguá do Sul estavam ligados à agricultura. Muitos deles ocupavam-se também com a indústria de transformação dos produtos agrícolas em produtos de consumo acabados. Isto acontecia com o leite, com o qual fabricavam queijo e manteiga, com o porco, de cuja carne faziam lingüiça, toucinho defumado e banha, por exemplo. Outros eram vendidos *in natura*. Por isso, muitos comércios,



estabelecidos nas regiões agrícolas, tinham suas filiais em centros consumidores maiores para onde levavam estes produtos, vendendo-os ao consumidor. Por outro lado, era destes centros que traziam as mercadorias que os colonos precisavam. Houve até quem,

discurso de inauguração de um destes comércios, os comparasse com um formigueiro para onde os colonos levavam os seus produtos (e dinheiro também).



O mesmo, ampliado. Na varanda, à esquerda, o pioneiro Jorge Wolf e seu filho Jorge. (Esta foto foi tirada de um cartão de visita de firma)

Botequim Restaurante
- DE -
JORGE WOLF
Av. Luiz Xavier N. 34 - CURITIBA - E. do Paraná

Recomendada aos seus amigos e frequentes: Doce, Bata, Bolacha, Café, Mido, Mipelo, Leite Nata, Sorvete, Chopp e Cerveja - Bebidas Nacionais e Estrangeiras - Vinho Manteiga doce e salgado, Fim e Brasa de Costado e de Trigo - Arroz de Jaraguá e de Blumenau, Salame, Lingüiça, Presunto, Queijo, Ovos, Doce de Leite, Mel de Abelha, Vinho de Cidra e mais outros artigos.

Conclusion

As above presented, the role of media can be both uniting and connecting through sharing information, which was the main role of the newspaper for the Hungarian immigrants and later for the descendants, who through the publications reinforced their culture, while assimilating with the new landscape. Over the years, the newspaper also got the important role of remembering, and bringing the history of the immigration journey and

all the contributions to the development of the city. Within the act of remembering, also through the column still present in the newspaper, the medium keeps reinforcing the collective memory.

For the conclusion, it is important to bring back the statement presented in the introduction of this work, regarding the essential question of how the movement is remembered and archived by whom and for what purposes (Smets, Leurs, Georgeu et al., 2020). As a researcher, the achievement of such

content is helping in the construction of the understanding of the cultural product of the Hungarian immigrants from the end of the 19th century in the new lands of Brazil. But it is also important to question the purpose from the perspective of the local communities and their members while remembering.

This work is part of a research focused on the investigation of Hungarian architectural patterns in Brazil and the architecture paths in Veszprém, in this sense, through this research on newspapers articles, it was possible to identify the main values and needs of the Hungarian families in the south of Brazil at that time. This can be reflected in their own architecture once this research takes the architecture as a cultural product. The articles from the newspaper analyzed do not show the relation of the Hungarians with the architecture itself, but their main values and needs, such as the values related to the religion, expressed in the construction of the oldest church of the city, dedicated to Saint Stephen, and the importance it was given to the education as well, which was seen in the divulgation of festivals happening every year in order to raise funds to the schools and the church. The commercial houses pointed out in this work represent not only the physical meeting point of the community but also a means of communication. In addition, the appearance of architectural elements, such as the photographs of the Wolf house, just under the newspaper role of remembering reinforces that the buildings are symbols of the past.

Finally, plenty of studies have been carried out about topics relating to communication, social media, and migration, but this work would like to make a connection also with memory and all the possibilities within digital media to keep strengthening many untold stories. As presented in this discussion, the newspaper had been playing the role of remembering, while also archiving in the digital format much important information to

portray the past. The final question surrounds possibilities of the emerging technologies. Allowing the archive storages of newspapers, but also social media it is allowing further communication between the members of the local community and researchers sharing and exchanging old photography which follows the remembering process. *What if the relationship between memory and forgetting were actually being transformed under cultural pressures in which new information technologies, media politics, and fast-paced consumption are beginning to take their toll?* (Huysen, 2000, 27.)

When one comes from the point of view already approached by Nora (1989), about the acceleration of history, thus, increasing the cultural pressure of new information also coming from the new technologies, it is very interesting to start questioning the new media's role concerning the past and the emerging possibilities of keep learning from it, through the process of remembering. „Media practices have historically shaped the imagining of forgotten pasts and possible futures” (Hedger, 2016, 3.), this work leaves open new questions for further studies regarding the new possibilities of connecting such untold stories.

Note: In the digital archive of newspapers in the state of Santa Catarina, only a few editions of the newspaper *Jaraguá: Seminários Nacionalistas* were found, and in these, no publications related to the topic of this research were identified, so this work focused on the findings of the newspaper *O Correio do Povo*.

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**PARENTAL FACTORS AS PREDICTORS
OF IN-SCHOOL ADOLESCENTS' BULLYING BEHAVIORS
IN KWARA STATE, NIGERIA**

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Abstract

Bullying is a complicated issue that arises from intricate relationships between family members, peers, the school community, and culture. One of the key indicators of bullying is parental variables. Studies linking various parental factors to bullying behaviour or roles are scarce, particularly in Nigeria. Therefore, this study examined parental factors as predictors of in-school adolescents' bullying behaviors in Kwara state, Nigeria. The population comprised 223, 893 in-school adolescents in Kwara State and a sample of 400 was drawn from this population across the State. The data were collected through the use of researchers' designed scale. The data collected were analysed using descriptive and inferential statistic. In the results, parental factors significantly predict in-school adolescents bullying perpetration and victimization. Based on the findings of the study appropriate recommendations were made.

Keywords: Parental Factors, In-School Adolescents, Bullying Behaviors

Discipline: pedagogy

Absztrakt**A SZÜLŐI TÉNYEZŐK, MINT A SERDÜLŐK ISKOLÁN BELÜLI ZAKLATÓ VISELKEDÉSÉNEK ELŐREJELZŐI NIGÉRIA KWARA ÁLLAMÁBAN**

A zaklatás bonyolult kérdés, amely a családtagok, a kortársak, az iskolai közösség és a kultúra közötti bonyolult kapcsolatából ered. A zaklatás egyik legfontosabb mutatói a szülői változók. Ritkán állnak rendelkezésre (különösen Nigériában) olyan tanulmányok, amelyekben különböző szülői tényezőket kötnének a zaklató viselkedéshez vagy szerepekhez. A populáció 223 893 iskolás serdülőből állt a nigériai Kwara államban, és ebből a populációból 400 fős mintát vettek szerte az államban. Az adatokat a kutatók által tervezett skála segítségével gyűjtötték. Az összegyűjtött adatokat leíró és következtető statisztika segítségével elemezték. Az eredmények szerint a szülői tényezők szignifikánsan előrejelzik az iskolai serdülők megfélemlítését és áldozattá válását. A vizsgálat eredményei alapján ajánlásokat fogalmaztak meg a szerzők.

Kulcsszavak: szülői tényezők, serdülők az iskolán belül, zaklató magatartások

Diszciplína: pedagógia

Introduction

Bullying in schools is regarded as a widespread issue that affects a sizeable number of children and adolescents. It is a severe problem, not just because of the obvious short-term effects, including the disruption of the school climate, but also because of the long-term effects on people who are impacted. Bullying puts both victims and perpetrators at risk for severe mental health concerns, which frequently linger into adulthood (Gini & Pozzoli, 2013; Gini & Espelage, 2014). Bullying is a complicated problem that results from the complexities of family, peer, and school connections as well as culture (Swearer & Doll, 2001). It is also a manifestation of defence mechanisms, which can be a reaction to both existential and identity-related problems (Kokkinos, 2013). Bullying is predicted by a number of factors, which have been found (Atik & Guneri, 2013; Kljakovic & Hunt, 2016). One of the most significant predictors of bullying is parental factors, such as disputes between parents, parental abuse and neglect, parenting methods, parental involvement and support,

parent-child communication, discipline, and so forth (Papanikolaou, Chatzikosma & Kleio, 2011; Wilson, Rush, Hussey, Puckering, Sim, Allely, Dokku, McConnachie, Gillberg, 2012; Kokkinos, 2013; Nocentini, Fiorentini, Di-Paola & Menesini, 2019).

Many parents develop their own parenting style depending on a variety of factors, and this style may alter as their children's personalities develop and as they move through different stages of life. A parent's dependable behavioural patterns toward one or more children are regarded as their parenting styles. It refers to the child rearing strategies adopted by the parents. According to Darling (2007), parenting styles define the emotional environment in which parents raise their kids. This can also be used to describe the parent's level of demands for performance, adherence to rules, and the disciplinary strategy used to enforce those demands (Nwazuoke, 2004). Parenting style, which is largely influenced by one's own parents, culture, family structure, and relationship with the parents, is influenced by the temperaments of both the parents and the children (Alegre, 2008).

Four factors were utilised to categorise parenting styles: parental control, parental communication, parental maturity expectations, and parental nurturing (Alegre, 2008). Baumrind (1991) and Olujinmi (2012) identified four main types of parent interaction styles: authoritarian, permissive, democratic, and uninvolved parents. In a strict, punitive parenting approach known as authoritarian parenting, parents make their kids follow their instructions and value their hard work. It prioritises compliance over all other factors. Parenting that is considered authoritative puts the needs of the kid first, fostering the growth of qualities that will help the child succeed in life (Meteyer & Jenkins, 2009). Democratic parenting, as it is also known, is characterised by few demands, little reactivity, and effective communication.

The term "permissive parenting" describes a parenting approach in which parents are actively involved with their kids yet do not place many restrictions on them or exercise much control over them. They give the youngster their full attention while being accepting and nurturing of their needs. Parents who are permissive do not think of themselves as leaders or role models. Instead of assuming the position of parents, they make an effort to be friends with their children (Rosenthal, 2002). Uninvolved parents are unconcerned with or uncaring about their child's developmental requirements; they are inconsistent with emotion, care, and discipline and might react to their child's behaviour in a variety of ways, from not at all to overly so (Pellerin, 2005). They are emotionally cold and disengaged.

To some extent, a child's experiences in their home environment impact how well they can adjust to the school setting and how they get along with their peers (Vindiova, 2014). The interaction between parents and teenagers may have a beneficial or bad impact on the children's or adolescents' behaviour (Kopko, 2007; Carter, 2011). There is a tonne of evidence to support the notion that

factors related to the family, such as family situation, socioeconomic status, mental health of parents, and attachment to parents (Dykas, Ziv & Cassidy, 2008; Kokkinos, 2013); conflicts between parents (Baldry & Farrington, 2000); parenting styles (Georgiou, 2008; Papanikolaou et al., 2011); maladaptive behaviour of parents, such as abuse and neglect (Lem Fanti, Demetriou & Hawa, 2012) impact adolescents behaviour. According to Mustapha, Bolu-Steve, and Ajiboye (2017), parental socio economic position and educational attainment are predictors of teenagers' bullying behaviour in schools.

Negative parenting practises including inadequate supervision and inconsistent, harsh treatment may help explain why some kids behave badly (Gutman & Vorhaus, 2012). Furthermore, Gámez-Guadix, Straus, Carrobes, Muoz-Rivas, and Almendros (2010) found that children are more likely to engage in antisocial or bad behaviours when their parents use harsh discipline. A correlation between severe punishment and children's bad behavioural adjustment was found by Mulvaney and Mebert in 2007. Poor parent-child relationships and a lack of parental support, according to Van As and Janssens (2002), may contribute to children's behavioural problems. Van As and Janssens (2002) discovered a link between children's behavioural issues and harsh discipline, which is characterised as screaming, yelling, shouting, slapping, and beating a child.

The system theory, which Donna Cross and Amy Barnes proposed in 2014, regarding family influences on children's bullying behavior, was supported by empirical findings on parental factors and bullying behaviors. According to the theory, a cordial family environment eventually leads to a cordial school setting and a bully-free environment. A child who is raised in a home with supportive parents is more likely to be a good person without bullying tendencies. Bullying is thought to have a social history that begins at home, where parents

are thought to have been the first educators during the early stages of development. The child is likely to adopt these characteristics and apply them to their peers at school if the parents punish their children harshly or if their marital conflict leads to physical abuse between them. Additionally, the Classical Ecological Theory, which Bronfenbrenner (2005) advanced, places an emphasis on the connections among human interaction, social context, rejection at home or from peers, and victimising behavior. According to the theory, family influences both peer victimisation and bullying in a reciprocal manner. The breakdown of societal bonds, according to the theory, contributes to delinquency (bullying). The act takes place when a person's connection to society is frayed or broken. This indicates that the qualities that bind people together have been destroyed, and the relationship is thus no longer present. This theory is applied to bullying behaviour that occurs when children are attached to their caregivers. Bullying may occur if the child's parents or caregivers act aggressively toward them. The causes of bullying are unclear, and even after controlling for hereditary factors, the effects of families remain unclear to people. Aggressive modelling and inadequate parental supervision are two contributing factors.

There are few studies, particularly in Nigeria, linking various parental factors or characteristics to bullying behaviour or bullying roles. According to some research results (Mustapha et al., 2017; Bada, Aderinto & Adebayo, 2021; Wokoma & Udochukwu, 2020), there is a positive and significant relationship between parenting practises and adolescents' in-school bullying behavior.

They all concentrated on the role that parenting practises play in how bullying is experienced or committed. This study concentrated on the degree to which in-school adolescents in the study local experienced negative parenting because there were few studies in this area; as well as bullying

behaviour among adolescents at school and parental influences.

The study also looked at whether a particular parental factor could predict a particular type of bullying behaviour among adolescents and which of the parental factors has the strongest correlation with it. The study also investigated whether parental factors predict in-school adolescents' bullying perpetration or victimisation experience.

Research Question

The study provide answer to the following research question: To what extent do in-school adolescents in Kwara state experience negative parenting?

Research Hypotheses

The following null hypotheses were raised and tested at 0.05 level of significance:

- HO₁ Parental factors will not significantly influence in-school adolescents bullying behaviours.
- HO₂ Parental factors will not significantly predict in-school adolescents' bullying perpetration and victimization.
- HO₃ Socioeconomic background of the parents will not significantly predict in school adolescents' bullying perpetration and victimization.
- HO₄ Family violence, parental abuse and neglect, parental non-involvement/violent support, parental communication, parental monitoring/supervision, discipline, parent-child communication would not significantly predict in-school adolescents bullying behaviours.
- HO₅ There is no specific parental factor significantly link to certain form of in-school adolescents' bullying behaviour.

Methodology

The study is quantitative and used a cross-sectional correlation type descriptive survey research design. All enrolled adolescents in Kwara state secondary schools, totaling 223, 893, comprise the study's population (Kwara state Ministry of Education and Human Capital Development, 2021). According to Research Advisor (2006), a sample size of 384 respondents is recommended for a study of this size. However, 5% of that number (19) was added to account for attrition, resulting in a final sample size of 403 in-school adolescents from all three senatorial districts in Kwara State. Simple random sampling, stratified sampling, and proportional sampling methods were used to choose the samples. The use of proportionate sampling is justified by the unequal distribution of schools and student populations across the senatorial district. In order to investigate the effects of various moderating variables on the respondents, data on their various factors must be collected. This data can be studied by classifying the respondents into several groups. To eliminate bias, both the school and the respondents were chosen at random. Following a thorough examination of the literature, the researchers created a three-part questionnaire that included a demographic component, a scale measuring parental factors, and a scale measuring bullying behaviour. The demographic part asks about the respondents' age, gender, schooling, and current living arrangements. Parental factors scale contains 10 categories of parental factors that could predict bullying behaviours. The ten categories are: Family violence (six items), parental abuse and neglect (six items), parental non-involvement or negative support (eight items), parental communication pattern (four items), monitoring and supervision (six items), discipline (six items), parent-child interaction (five items), parental attachment, mental health status, socio-economic status (three items). The parental factors scale has a stem: "As an individual, my

parents do:". Examples of items on each category of the parental factors scale include:

Family violence: my parents abuse one another on little misunderstanding, fight each other etc.

Parental abuse and neglect: my parents do not listen or pay attention to me, do not praise or encourage me among others.

The third section; the bullying behaviour scale has 20 items; it is an adapted scale from Mustapha (2020) bullying behaviour measure which originally has 40 items seeking respondents' involvement in the perpetration or experience of different forms of bullying behaviour. The scale has two sections; first section has items on perpetration of bullying behaviour while the second section has items on experience of different forms of bullying victimization. The questionnaire was validated by three experts from Department of Counsellor Education and have reliability coefficient of 0.89 and 0.74 for sections B and C. Questionnaire employed four points Likert-Type rating scale of Almost all the time (AAT) – 4 points, Many Time (MT) – 3 points, sometimes (ST) – 2 points, Rarely (R) – 1 point. For section B, except for item 39-43 which have reverse rating pattern, the rating scale of 5 times/ more – 4 points, 3 or 4 times – 3 points, Once/twice – 2 points and Never – 1 point was used for section C. Both descriptive and inferential statistics were used to analyse the information collected from the participants. The demographic information from the respondents and data collected from section B of the instrument was analysed using percentages. Any responder who scored between 145 and 192 in section B was deemed to have experienced parental violence to a significant degree, whereas scores between 97 and 144 were deemed to have had moderate experience and 48 to 96 to have had little to no experience. At significance levels of 0.05, inferential statistics including pair t-tests, regression, and Univariate Analysis were also utilised to evaluate the five null hypotheses.

Results

Demographic Data

This section presents the results of data obtained from the respondents in frequency and percentages (Table 1).

Table 1. Percentage Distribution of Respondents Based on Demographic Data.

Variable	Frequency	Percentage
Gender		
Male	135	34.3
Female	259	65.7
Total	394	100
Age		
10-13 years	224	56.9
14-16 years	128	32.5
17 years and above	42	10.7
Total	394	100
School Type		
Private	40	10.2
Public	354	89.8
Total	394	100
Who do you live with?		
Two biological parents	299	75.9
Father only	23	5.8
Mother only	19	4.8
father and a step mother	17	4.3
Guardian	36	9.1
Total	394	100
Location		
GRA	31	7.9
Typical Area	363	92.1
Total	394	100
Mode of Residence		
Rented Apartment	154	39.1
Family house	162	41.1
Parent-owned house	71	18.0
Squatting	7	1.8
Total	394	100

The table 1 reveals that 135 (34.3%) of the respondents were male, while 259 (65.7%) of the respondents were female. Based on age, the table reveals that 224 (56.9%) of the respondents were between 10-13 years old, 128 (32.5%) of the respondents were between 14-16 years old, while 42 (10.7%) of the respondents were 17 years of age and above. The table also shows that 40 (10.2%) of the respondents were from private school, while

354 (89.8%) of the respondents were from public school. 299 (75.9%) of the respondents were living with their two biological parents, 23 (5.8%) of the respondents were living with their father only, 19 (4.8%) were living with their mother only, 17 (4.3%) were living with father and a step mother while 36 (9.1%) were living with guardian. Majority (92.1%) of the respondents' were living in typical area. 154 (39.1%) of them were living in rented apartment, 162- (41.1%) were in family house, 71(18.0%) were living in parent-owned house while 7 (1.8%) were squatting.

Table 2. Percentage Distribution of Properties Owned by the Respondents' Parents

Properties	Owned	Not Owned
Radio	353 (89.6%)	41 (10.4%)
Mobile phone	162 (41.1%)	232 (58.9%)
IPhone	22 (5.6%)	372 (94.4%)
Television	359 (91.1%)	35 (8.9%)
Satellite/TV decoder	123 (31.2%)	271 (68.8%)
Computer	141 (35.8%)	253 (64.2%)
Solar system of energy	52 (13.2%)	342 (86.8%)
A Car/two	295 (74.9%)	99 (25.1%)
Many cars	222 (56.3%)	172 (43.7%)
Self-owned well	124 (31.5%)	270 (68.5%)
Self-dig borehole	222 (56.3%)	172 (43.7%)
Public well	102 (25.9%)	292 (74.1%)
Public borehole	240 (60.9%)	154 (39.1%)

Table 2 shows that more than 50 percent of the respondents' parents were reported to owned radio, television, a car/two, many cars, self-dig borehole and public borehole. On the other hand, more than 50% did not own mobile phone, Iphone, satellite/TV decoder, computer, solar system of energy, self-owned well and public well. These were used to establish students' socioeconomic class.

Research Question 1: To what extent do in-school adolescents in Kwara state experience negative parenting?

Table 3. Percentage Distribution of the Extent to which Respondents Experience Negative Parenting.

Parental Factor	Great Extent	Some Extent	Low Extent
Family Violence	24 (6.1%)	215 (54.6%)	155 (39.3%)
Parental Abuse and Neglect	3 (0.8%)	237 (60.2%)	154 (39.1%)
Parental non-Involvement	17 (4.3%)	227 (57.6%)	150 (38.1%)
Parental violent support	12 (3.0%)	236 (59.9%)	146 (37.1%)
Parental Communication	16 (4.1%)	248 (62.9%)	130 (33.0%)
Parental Monitoring/Supervision	25 (6.3%)	243 (61.7%)	126 (32.0%)
Discipline	183 (46.4%)	91 (23.1%)	120 (30.5%)
Parent-Child Interaction	158 (40.1)	87 (22.1%)	149 (37.8%)
Attachment to parents	147 (37.3%)	107(27.2%)	140 (35.5%)
Parent Mental Health	24 (6.1%)	87 (22.1%)	283 (71.8%)

Table 3 reveals that all the respondents experience varying levels of negative parenting across the parenting dimensions. Significant percentage of respondents (46.4%, 40.1% and 37.3%) reported experiencing negative parenting in terms of discipline, parent-child interaction and attachment to parents to a great extent. Also, early two third of respondents reported moderate experience of negative parenting in term of parental communication, parental monitoring/supervision, parental abuse and neglect, family violence, parental non-involvement and parental violent support, while majority of the respondents reported low experience of negative parenting in terms of parent mental health.

Hypotheses Testing

Hypothesis 1:

Parental factors will not significantly influence in-school adolescents bullying behaviours.

Table 4 shows that p-value of .000 which is less than 0.05 level of significance which implies that parental factors significantly have influenced on in-school adolescents bullying behaviours.

Table 4. Pair t-test showing the Influence of Parental Factors on Respondents' Bullying Behaviours.

Variable	N	Mean	SD	df	Cal. t-value	p-value
Parenting factors	394	101.7	29.66	393	68.04*	.000
Bullying	208	22.90	3.98			

*Significant, $p < 0.05$

Hypothesis 2:

Parental factors will not significantly predict in-school adolescents' bullying perpetration and victimization.

Table 5a: Model Summary

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.513 ^a	.264	.253	22.675

a. Predictors: (Constant), Parental Factors

Table 5b. Analysis of Variance (ANOVA)

Model	Sum of Squares	df	Mean Square	F	p-value
Regression	26494.47	2	13247.23	25.76*	.000 ^b
Residual	74038.19	144	514.15		
Total	100532.66	146			

a. Dependent Variable: Perpetration and Victimization

b. Predictors: (Constant), Parental Factors

Table 5c. Regression Coefficient showing Parental Factors predicting Bullying Perpetration and Victimization of the Respondents

Model	Un- Coefficients		Standardized Coefficients		t	Sig.
	standardized		Coefficients			
	B	Std. Error	Beta	Beta		
(Constant)	187.20	12.70			14.73	.000
Perpetration	-3.52	1.00	-0.26	-0.26	-3.50	.001
Victimization	-1.70	0.33	-0.37	-0.37	-5.05	.000

a. Dependent Variables: Perpetration and Victimization

In the Table 5a, adjusted R square of .253 which is also 25.3% revealed that the independent variables (parental factors) when combined significantly predict in-school adolescents bullying's perpetration and victimization. In the Table 5b, the result of the ANOVA table p-value of .000 which is less than 0.05 implies that there is significant difference in the parental factors significantly predict in-school adolescents' bullying perpetration and victimization. Contribution of parental factors to bullying perpetration and victimization in table 5c also showed that parental factors significantly predict in-school adolescents' bullying perpetration (Beta weight (β) of -0.26, $t = -3.50$, $p < 0.05$) and victimization (Beta weight (β) of -0.37, $t = -5.05$, $p < 0.05$).

Hypothesis 3:

Socioeconomic background of the parents will not significantly predict in-school adolescents' bullying perpetration and victimization.

Table 6a. Model Summary.

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.086 ^a	.007	-.006	1.691

a. Predictors: (Constant), Socioeconomic background of the parents

Table 6b: Analysis of Variance (ANOVA)

Model	Sum of Squares	df	Mean Square	F	p-value
Regression	3.070	2	1.535	.537	.586 ^b
Residual	411.597	144	2.858		
Total	414.667	146			

a. Dependent Variable: Perpetration and Victimization

b. Predictors: (Constant), Socioeconomic background of the parents

Table 6c. Regression Coefficient showing Socioeconomic Background of the Parents predicting Bullying Perpetration and Victimization of the Respondents.

Model	Un- Coefficients		Standardized Coefficients		t	Sig.
	standardized		Coefficients			
	B	Std. Error	Beta	Beta		
(Constant)	6.913	.947			7.299	.000
Perpetration	.049	.075	.057	.057	.656	.513
Victimization	.015	.025	.051	.051	.589	

a. Dependent Variables: Perpetration and Victimization

The null hypothesis was accepted as the adjusted R square indicated that Socioeconomic background of the parents has small chance (-.006, that is 0.06%) of predicting in-school adolescents' bullying perpetration and victimization (see Table 6a), hence, socioeconomic background of the parents will not significantly predict in-school adolescents' bullying perpetration and victimization (Beta weight (β) of 0.057, $t = .656$, $p > 0.05$) and victimization ((Beta weight (β) of 0.051, $t = .589$, $p > 0.05$)).

Hypothesis 4:

Family violence, parental abuse and neglect, parental non-involvement/violent support, parental communication, parental monitoring/supervision, discipline, parent-child communication would not significantly predict in-school adolescents bullying behaviours.

Table 7a. Model Summary.

Model	R	R Square	Adjusted R Square	Std. Error of the Estimate
1	.463 ^a	.214	.174	3.617

a. Predictors: (Constant), Parental Factors

Table 7b. Analysis of Variance (ANOVA)

Model	Sum of Squares	df	Mean Square	F	p-value
Regression	702.24	10	70.22	5.36*	.000 ^b
Residual	2576.63	197	13.07		
Total	3278.88	207			

a. Dependent Variable: Bullying behaviour

b. Predictors: (Constant), Parental Factors

Table 7c. Regression Coefficient showing Parental Factors and Bullying Behaviours of the Respondents.

Model	Unstandardized Coefficients		Standardized Coefficients	t	Sig.
	B	Std. Error	Beta		
(Constant)	22.59	1.12		20.14	.000
Family Violence	2.48	.99	.32	2.50	.013
Parental Abuse and Neglect	1.44	1.82	.18	.79	.428
Parental non-Involvement	-2.96	1.48	-.37	-1.99	.047
Parental violent support	-3.64	1.34	-.46	-2.71	.007
Parental Communication	-2.09	1.22	-.26	-1.70	.090
Parental Monitoring/Supervision	1.507	.98	.19	1.53	.126
Discipline	1.74	.81	.41	2.14	.033
Parent-Child Interaction	-1.12	.61	-.26	-1.84	.066
Attachment to parents	1.12	.46	.23	2.44	.015
Parent Mental Health	1.14	.47	.17	2.43	.016

a. Dependent Variable: bullying

The independent variables (all parental factors) together strongly predict bullying behaviours among teenagers in school, according to Table 7a's adjusted R square of 0.174, which translates to 17.4%.

In Table 7b, the ANOVA table's p-value of 0.000, which is less than 0.05, indicates that there is a significant difference in the parental factors predicting the bullying behaviours of teenagers in school. Table 7c indicates contribution of variables (each of the parental factor) to bullying behaviour. Family violence has a Beta weight (β) of .32, $t=2.50$, $p<0.05$. Parental non-involvement has a Beta weight (β) of -.37, $t = -1.99$, $p<0.05$. Parental violent support has a Beta weight (β) of -.46, $t = -2.71$, $p<0.05$. Discipline has a Beta weight (β) of .41, $t = 2.14$, $p<0.05$. Attachment to parents has a Beta weight (β) of .23, $t = 2.44$, $p<0.05$. Parent Mental Health has a Beta weight (β) of .17, $t = 2.43$, $p<0.05$.

Based on the result, it could be seen that family violence, parental non-involvement, parental violent support, discipline, attachment to parents and parental mental health predict in-school adolescents bullying behaviours.

Hypothesis 5:

There is no specific parental factor significantly link to certain form of in-school adolescents' bullying behaviour.

Table 8 reveals that p-value is less than 0.05 significant level in the various forms of bullying behaviours. This implies specific parental factor significantly link to certain form of in-school adolescents' bullying behaviours. The table showed that family violence influenced physical bullying; parental abuse and neglect influenced physical, verbal, relational and sexual bullying behaviours; parental non-involvement influenced physical, verbal and sexual bullying behaviours; parental violent support influenced physical and relational bullying behaviours; parental communication influenced physical, verbal and relational bullying behaviours; parental monitoring/supervision influenced physical, verbal and sexual bullying behaviours; discipline influenced physical and verbal bullying behaviours; parent-child interaction influenced physical and verbal bullying behaviours; attachment to parents influenced physical, verbal and sexual bullying behaviours while parent mental health did not influence any bullying behaviour.

Table 8. Summary of Regression Coefficient showing Specific Parental Factor Linked to Certain form of Bullying Behaviours of the Respondents.

Variable	Model	Unstandardized Coefficients		Standardized Coefficients		t	Sig.
		B	Std. Error	Beta			
Family Violence	(Constant)	47.81	4.58			10.43	.000
	Physical	.13	.02	.38		6.30	.000
Parental Abuse and Neglect	(Constant)	1.16	.07				
	Physical	.17	.01	.56		10.40	.000
	Verbal	-.06	.01	-.37		-4.93	.000
	Relational	-.05	.02	-.26		-2.69	.007
Parental non-Involvement	(Constant)	.94	.07				
	Physical	.20	.01	.59		11.02	.000
	Verbal	-.06	.01	-.33		-4.40	.000
	Sexual	.05	.02	.21		2.28	.023
Parental violent support	(Constant)	1.15	.07				
	Physical	.17	.01	.53		9.37	.000
	Relational	-.10	.02	-.42		-4.17	.000
Parental Communication	(Constant)	1.10	.07				
	Physical	.21	.01	.64		11.97	.000
	Verbal	-.03	.01	-.20		-2.66	.008
Parental Monitoring/Supervision	(Constant)	-.06	.02	-.28		-2.96	.003
	Physical	.22	.01	.64		12.39	.000
	Verbal	-.07	.01	-.38		-5.36	.000
Discipline	(Constant)	.07	.02	.26		3.00	.003
	Physical	1.97	.11			17.09	.000
	Verbal	.35	.02	.67		12.84	.000
Parent-Child Interaction	(Constant)	-.09	.02	-.31		-4.34	.000
	Physical	1.64	.12			13.68	.000
	Verbal	.35	.02	.65		12.30	.000
Attachment to parents	(Constant)	-.14	.02	-.44		-5.97	.000
	Physical	2.11	.13			16.22	.000
	Verbal	.21	.03	.40		6.73	.000
	Sexual	-.08	.02	-.26		-3.13	.002
Parent Mental Health	(Constant)	-.11	.04	-.28		-2.79	.005
	nil	nil	nil	nil	nil	nil	nil

Discussion

The study revealed that, sizeable percentage of in-school adolescents were experiencing high level of negative parenting in terms of discipline, parent-child interaction and attachment to parents. Also, significant percentage of respondents reported experiencing moderate negative parenting in term of family violence, parental abuse and neglect, parental non-involvement, parental violent support, parental communication, parental monitoring/supervision while majority of the respondents

have minimal experience of negative parenting regarding parent mental health. The discovery is related to the research of Lincolne (2019), who found a high rate of negative parenting as more than one third of respondents believed they were doing a poor job as parents. This study's findings differ from those of Lincolne (2019) in that this study's respondents were adolescents, whereas Lincolne's respondents were parents. The two studies did discover that adolescents experience negative parenting in a variety of ways. The idea

put forth by Booster, Nissley-Tsiopinis, Van Dyke, and Power (2016) that parents frequently use negative parenting techniques (such as spanking, yelling, shaming, ordering the child around, and using unclear directives) in raising children is also in line with this.

The finding of the study revealed that parental factors significantly have influenced on in-school adolescents bullying behaviours. The finding supports the finding of Cross and Barnes (2014) who hypothesised that bullying and peer victimization are reciprocally influenced by family. Similarly, Vindiova (2014) asserted that children's experiences with their family environment, to some extent, determine their ability to adapt to the school environment both negative and positive ways.

In the findings, it was found that parental factors significantly predict in-school adolescents' bullying perpetration and victimization. The finding relates to the studies of Álvarez-García, García and Núñez (2015), Cook, Williams, Guerra, Kim and Sadek, (2010) who reported that parent-child relationships could be either important risk or protective factors for bullying perpetration and victimization. Likewise, Zurcher et al. (2018) and Govender and Young (2018) reported that authoritarian parenting behaviors served as a risk factor for bullying perpetration and victimization.

The finding showed that socioeconomic background of the parents did not significantly predict in-school adolescents' bullying perpetration and victimization. This suggests that the socioeconomic status of the parents did not have an impact on how bullying was committed and how teenagers were victimised at school. The results contradict a study by Jansen, Verlinden, Berkel, Mieloo, Ende, Veenstra, Verhulst, Jansen, and Tiemeier (2012) that found significant socioeconomic differences in bullying and victimisation in early elementary school: kids from lower socioeconomic families had a higher risk of engaging in bullying - either as a victim, bully, or bully-victim - than kids from

higher socioeconomic backgrounds. According to Tippet and Wolke (2014), bullying behaviours are predicted by socioeconomic status since both victims and bully-victims are more likely to come from low socioeconomic status households.

The result of the finding revealed that family violence, parental non-involvement, parental violent support, defective discipline, attachment to parents and parental mental health predict in-school adolescents' bullying behaviours compared to other parental factors. The finding supports the studies of Baldry and Farrington (2000); Dykas, Ziv and Cassidy (2008); Kokkinos (2013); Fanti, Demetriou and Hawa (2012), Gámez-Guadix, Straus, Carrobbles, Muoz-Rivas, and Almendros (2010); Gutman and Vorhaus (2012); Georgiou (2008); Papanikolaou et al., (2011) who reported that factors such as conflicts between parents, mental health of parents, attachment to parents, parental involvement and support, inconsistent and harsh discipline and parenting styles are predictors of bullying behaviour of in-school adolescents.

The finding revealed that specific parental factor significantly linked to certain form of in-school adolescents' bullying behaviours. It was discovered that all facets of dysfunctional parenting affected bullying's physical manifestation. It is discovered that only physical bullying was influenced by family violence. This backs up the findings of the 2011 study by Papanikolaou, Chatzikosma, and Kleio, which found that student fights with peers at school were influenced by parent-child disputes. Additionally, it has been discovered that physical, verbal, relational, and sexual bullying behaviours are affected by parental abuse and neglect. The discovery is consistent with studies by Lereya et al. (2013) and Veenstra et al. (2005) that found parental maltreatment, abuse, and neglect to be major contributors to student bullying. The results showed that parental neglect had an impact on verbal, physical, and sexual bullying behaviours. This supports Wolke and Skew's (2011) finding

that verbal bullying was associated with sibling composition and a lack of or unfavourable parental involvement. In the study, it was discovered that parental violent support influenced both relational and physical bullying behaviours. This supports the argument made by Bowers, Smith, and Binney (1992), who claimed that families with high levels of cohesion, parental involvement, and support, as well as parental overprotection, are more likely to produce physical bullies.

It was found that poor parental communication influenced physical, verbal and relational bullying behaviours. This finding coincides with the results of the research conducted by Buelga, Belén and María-Jesús (2017) who discovered that having restrictive (non-open) pattern of communication with the mother and avoidant communication with the father, predicted the role of verbal, relational and cyberbullying. Physical, verbal, and sexual bullying behaviours were also influenced by a lack of parental supervision or monitoring.

This is consistent with a study by Duff and Hood (2018) that found a negative correlation between parental supervision and the perpetration of cyberbullying and sexual bullying. Bullying behaviours, both physical and verbal, were found to be influenced by poor or harsh parental discipline. This is relevant to the research by Gamez-Guadix, Straus, Carrob-les, Muoz-Rivas, and Almendros (2010), who found that children who experience corporal punishment from their parents are more likely to engage in antisocial or negative behaviors. Bullying behaviours, both physical and verbal, were also found to be influenced by negative parent-child interactions.

The result of the study by Spriggs, Iannotti, and Nansel (2007) that parent-child interaction was linked to various bullying roles was further supported by the finding. According to Ulfah and Gustina (2020), adolescents' bullying behaviour at school is negatively predicted by their parents' poor communication styles. The conclusion showed that

overly close attachment to parents affected behaviours of physical, verbal, and sexual bullying. In a previous study, Cho, Hong, Sterzing, and Woo (2017) claimed that parental acceptance, warmth, and attachment could all help predict verbal bullying and victimisation among adolescents.

Conclusion

From the findings of this study, it was concluded that significant percentage of in-school adolescents in study area reported experiencing high level of negative parenting in terms of discipline, parent-child interaction and attachment to parents. They also experienced moderate level of negative parenting in term of family violence, parental abuse and neglect, parental non-involvement, parental violent support, parental communication, parental monitoring/supervision.

The negative parenting experience also predict both bullying perpetration and victimisation experience of in-school adolescents in the study locale with the exemption of the parents' socioeconomic background. Of the ten parental factors considered in this study, six (family violence, parental non-involvement, parental violent support, discipline, attachment to parents and parental mental health) significantly predict bullying behaviour of in-school adolescents in the study area.

All the ten parental factors considered in the study significantly linked with physical bullying, seven (Parental Abuse and Neglect, Parental Non-Involvement, parental poor communication, lack of monitoring and supervision, inappropriate discipline measure, parent-child interaction and attachment to parents) of the ten parental factors considered significantly connected with verbal bullying. Four of the ten parental factors (attachment to parents, Parental monitoring/Supervision, Parental non-Involvement and Parental Abuse and Neglect) considered linked with sexual bullying. Two (poor parental communication and parental

violent support) of the parental factors considered linked with relational bullying.

Implications for Counselling Practice

The findings of this study have some implications for Counsellors and counselling practice. The current study revealed that in-school adolescents reported experiencing negative parenting and that parental factors significantly influence in-school adolescents' bullying behaviours.

Counsellors must educate parents on how parenting practices and other parental factors affect children's bullying behaviour because Family violence, parental non-involvement, parental violent support, discipline, attachment to parents and parental mental health affect children's development. Counsellors must orientate parents on parenting methods including using severe and inconsistent punishment on children, which frequently result in child aggressiveness both within and outside the home. Counsellors could also encourage parents to take part in government-sponsored parenting education programs to assist them in their parenting duties.

The client and counsellor's relationship is one of mutual support in counselling. It is crucial to remember that students require help in dealing with bullying in school and at home. In order to introduce them to various tactics for behavioural modification, the professional counsellor should be prepared to identify students who exhibited bullying behaviour as a result of negative parental factors. The school counsellor can educate the teachers on the influence that parental factors have on adolescent bullying behaviour so as to help in identifying students that experience negative parenting for prompt intervention.

Recommendations

Based on the findings, the following recommendations were made:

- The parents should be encouraged to adopt the best parenting practices in the upbringing of their children to prevent bullying behaviours.
- Counsellors should organize regular seminars and conferences for parents to enlighten them on the methods to do away with negative parenting practice and adopt good parenting practices in bullying prevention interventions.
- Parental factors should be considered in the prevention and intervention programmes for all forms of bullying behaviours.
- Counsellors should engage in-school adolescents experiencing negative parenting in bullying prevention programme irrespective of their age, gender or school type

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**THE SOCIAL INTEGRATION AND SOCIAL MOBILITY:
AN EXAMPLE FROM HODÁSZ**

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Abstract

The paper examines the social mobility process of Romani youngsters in a settlement that is in one of the most disadvantaged regions of Hungary. Hodász became the centre of interest due to the relevant research concerning the mobility issue, because here, just contrary to the communities have similar sociocultural features, there are number of young Romani who could stand out by learning. The author interprets in wider aspects the determinative local norms, and the scale of values of local Vlach Romani community make possible for lots of local youngsters, that they can be graduated. In the second part of the paper the reader can understand the intellectual career by three studies, and consequently the social integration doesn't automatically yield social mobility. In the situational analyses of Hodász example can be circumscribed the specific preconditions of intellectual career in the case of the young Romani and disadvantageous.

Keywords: social mobility, integration, Romani community, intellectual career,

Diszcipline: cultural anthropology

Absztrakt

A TÁRSADALMI INTEGRÁCIÓ ÉS A TÁRSADALMI MOBILITÁS: HODÁSZI PÉLDA

A tanulmány Magyarország egyik leghátrányosabb helyzetű kistérségében található nagyközség esetében vizsgálja a roma származású fiatalok társadalmi mobilitásának folyamatát. Hodász település a vonatkozó kutatások tükrében azért került a figyelem középpontjába, mert ellentétben a hasonló adottságú hátrányos helyzetű zárt roma közösségekkel, itt feltűnően nagy számban sikerült a fiataloknak a tanulás révén kiemelkedniük. Az elemzés átfogóan értelmezi azokat a helyi társadalom működését meghatározó szabályokat, az oláh cigány közösség lokális értékrendjét jellemző sajátosságokat, amelyek lehetővé tették,

hogy roma fiatalok nagy számban szerezzenek felsőfokú végzettséget. A tanulmány második felében három esettanulmányon keresztül az olvasó azt is megértheti, hogy az értelmiségi pálya, az ennek keretében lejátszódó integráció nem eredményez automatikusan társadalmi mobilitást. Ennek belátásához a szituatív elemzés révén, Hodász példájában meghatározhatóak azok a tényezők, amelyek az értelmiségi pályára kerülés alapfeltételeit képezték.

Kulcsszavak: társadalmi mobilitás, integráció, roma közösség, értelmiségi pálya,

Diszciplína: kulturális antropológia

Introduction

Hodász is a village in the Mátészalka District in North-Eastern Hungary and has a population just over 3000. This little village achieved outstanding results in social integration with its special practices. Hodász lies in one of the most disadvantaged micro-regions of Hungary. According to its economic and infrastructural conditions, employment rates and social situations many factors make the everyday life of the local community more difficult.

According to our studies on social composition 62-67% of the population is member of the Roma ethnic minority and only 33-38% of the local community is Hungarian. (The method of expert estimation was used to approximate the ratio of local Roma population). Ethnic ratios have considerable impact on local social-cultural-economic relations. Our previous experiences show that in the case of settlements where the reorganization of ethnic ratios can be observed, therefore the relation of majority and minority is exchanged (in this case Roma minority becomes the local majority), social processes (e.g., social structural changes) accelerate. Usually, the aging members of the Hungarian population stay in the village, while younger Hungarians from communities with greater mobility move away in a short time.

Another typical process is the emergence of antagonistic relationships between the remaining groups and younger Roma communities. Characteristic signs of this process are the appearance of

increasing segregation-isolation strategies and excluding attitude in many areas of everyday life, or even the ghettoization of settlements. These processes and their complex effects often worsen the coexistence of these communities and make their life more difficult (Kotics, 2020).

However, the case of Hodász shows difference from the typical patterns because here the coexistence relations cannot be described along the above-mentioned social processes. During our studies on the village we identified the development of special ethnic coexistence system. We can say that the experience of belonging to the local community (“local Hodász ethos”) overtook the sense of ethnic affiliation. Consequently, different forms of affirmative relations can be observed between local sub-communities (Hungarian, Vlach Roma, Romungro). The transethnic corridors between the ethnic groups of the local society in Hodász represent fairly the mutual acceptance of each other. This manifests for example in the increasing number of mixed marriages or in different cultural adaptation processes (cp. Szabó, 2022).

The analysis of socio-demographic data of Hodász shows that employment indicators of the local population are increasing steadily. The number of educated inhabitants is growing and the number of Roma among them is increasing as well. However, according to Census 2011 this ratio is still below the national average. In Hodász 2.8% of the population has a higher education degree and the county average (10.5%) is the second lowest in Hungary. “Education for the Roma population above 15

years of age is below the national average. While in 2012, 24.6% of the national population did not have a higher level of education than eighth grade, while this figure was 77.7% within the Roma population. The difference between the Roma and the national rate is also very high for the GCSE and post-secondary education. In the entire country 31.3% have reached the level of a high school graduate, the proportion among the Roma population is just 4.6%. The proportion of post-secondary graduates for the entire country is 18.5%, while this ratio is less than 1% among Roma.” (I1).

Education level indicators themselves can lead to valuable conclusions but if they are matched with employment data, we can see that Hodász follows the characteristics of settlements in disadvantaged regions. 68% of the working age population is employed, 32% is unemployed, which shows a significant difference from the national average (in 2011 5.72% was the unemployment rate in Hungary). At the same time our studies and empirical experiences show that public work programme ensures income for many inhabitants of Hodász as well, however, this form of employment is not ethnically organized. Moreover, it is special in Hodász that an increasing number of young Roma graduates works in their profession.

If a local community has any atypical sociocultural indicators, it is justifiable to discover the reasons of differences. The 1950's brought significant changes in the society of Hodász from the aspect of ethnic coexistence. The activity of Miklós Sója, a Greek Catholic priest must be emphasized. His aim was to support the local Vlach Roma community and help their social integration. The Greek Catholic Church built a church in the middle of the Roma settlement and has established many social institutions through the years. Religion, the power of faith and the desperate work of Miklós Sója had positive effects on Roma living conditions and the different institutions sustained by the Church still provide stable workplace for a high

number of local Roma. All these changes had evincible impacts on settlement-level as well: the relations of previously segregated and isolated ethnic groups started to improve, and the social and economic differences of sub-communities started to equalize as well (cp. Szabó, 2022).

The social processes of the village are modified further by many opportunities where Hungarians and Roma can meet as equal partners and have chances for cooperation and collaboration. This means that mixed ethnic circumstances can evolve not only in the educational institutions but in NGOs and in different fields of the labour market as well. The increasing number of Roma graduates in Hodász was an important condition of these circumstances.

The aim of our study was to uncover the reasons why the case of Hodász is special and could evoke wider interest. In our analysis we discuss with the help of three case studies those local opportunities that made the emergence of this special local society possible. Based on our results we introduce in detail the socio-demographic features of young Roma students from Hodász.

Study on university students of Roma origin

A comprehensive survey (Human Register, 2020) was conducted on the sociocultural composition, geographical recruitment and higher education situation of members of Roma Colleges for Advanced Studies (Biczó and Szabó, 2020a). According to current regulation a Roma College for Advanced Studies (hereinafter Roma College) is a higher educational institution which aims to support talented young Roma, functions as an integrated university community and meets the regulation that the ratio of Roma students in the college has to be at least 70%.

Terms of membership are Roma origin, disadvantaged situation and/or interest in Roma culture.

The profile of the “typical” Roma college student has been created according to the data of the 11 Hungarian Roma Colleges collected in the Human Register 2020. Based on this Roma College members are mainly students of Roma origin from peripheral villages or small towns, living with their families and few siblings. Generally, they choose shortage occupations with lower entry requirements but high social relevance (in the field of education, social sciences, health care) (Biczó and Szabó 2020a, 99.) This general description is largely true to the studied thirteen young Roma graduates from Hodász, most of whom were members of Roma Colleges during their higher education studies.

Our surveys on native places of students had surprising results. At the time of our survey (in 2020) Hodász gave the highest number of Roma students into the higher education system. It is important to note that our database contains only students who were members of Roma Colleges, but in this case it raise an interesting question. The full sample consisted of 326 students, from which 13 came from Hodász. So it should be important to explain, how such a small village, like Hodász could be so successful in the motivation of Roma to continue their studies.

We know from the sample of students of Roma Colleges that their parents are poorly educated. In the case of fathers it means eight grades of elementary school, while one half of the mothers completed elementary school and the other half has finished vocational school. It means that the studied young Roma from Hodász are first-generation college students. The employment status of parents is maybe an even more important background factor. It is prominent that only three fathers were unemployed, and none of them was employed in public work at the time of the survey. In conclusion we can say that the education and employment features of parents of Roma College students are more favourable than the average.

Besides supportive family background students need many personal qualities and skills for successful studies in higher education. Perseverance, regularity and permanent daily routine are of high importance in the case of Roma students, because in absence of these skills it is difficult to complete a degree. Roma students have to face many difficulties (i.e. lack of competences, learning disabilities, negative discrimination) which often results in drop-out.

Family background represents a determining factor. The thoughts of the foster mother of one Roma graduate exemplify that involved people themselves identify the role of family as an important factor: “Well, to that I can say that depends on the environment. Where he or she belongs, that means a lot. And what these young wants, what he or she gets from the given community. This means a lot. [...] if the family doesn’t stand by as a background, saying I let him or her go. But if the environment doesn’t care or pay attention... I don’t know what would have happen in that case.” (Biczó and Szabó, 2022)

A social worker who has been working through years in Hodász summarized the main factors that hold back young Roma from further education in tradition-following communities as follows: “Vlax Roma in the local community live their culture every single day. So, there we don’t speak about traditions, for them it’s part of their everyday life. The most evident is that they use Romani language with each other. It doesn’t matter whether they are in stores, go the pharmacy or to their teacher at school. They keep their traditions in the same way. There are things that have started to change a bit, so you can see the ravages of time here as well. The tradition of elopement still exists, they follow the romani crisi, so there are Roma laws and those are more important to them. They live this every single day, children grow up in it. It is hard to imagine in Hungary, but here it is still a huge problem, that children start to learn the Hungarian language at

the age of three when they go to kindergarten. And they also start to socialize with the majority society in the kindergarten.” (Biczó and Szabó, 2020b).

„Because of traditions, because of language use, because they don’t speak the Hungarian language the same way, not on the same level. And for example, this was a huge problem when the first group entered higher education. A completely strange environment, where you should learn technical terms, however, we don’t even understand Hungarian on such a high level, therefore we don’t understand the nuanced expressions.” (Biczó and Szabó 2020b).

This means that the family background, living environment and sociocultural opportunities determine the chances of young Roma whether as a condition of entering higher education or as difficulties in successful compliance of university studies. With further analyzation of features of students of Roma Colleges we can find a markable item of data, i.e., ten of the thirteen students have graduated from the Pista Dankó Education Center in Biri. Moreover, all of them took advanced level school leaving examination. Twelve students entered higher education with a language certificate. Another remarkable fact is that they all identified themselves of Roma origin. Six students are multiply disadvantaged, three are, and only four of them do not belong in any of these two categories. (The four students cannot be classified as disadvantaged because of their age, but according to empirical experience they meet the other criteria of this category.)

Compared to the whole sample of Human Register 2020 the numbers show considerable difference as in the case of students of Hungarian Roma Colleges only 25% is disadvantaged, 27% is multiply disadvantaged and 48% is not disadvantaged. Therefore the socio-economic conditions of the whole sample are more favourable than of student from Hodász (cp. Biczó and Szabó, 2020a). Ágnes Lukács (2017) laid great emphasis on the

mapping of sociocultural background of Roma graduates. From her point of view this background factor has significant impact on social mobility. Conclusions of her study showed that besides non-segregated living environment education level of parents, stable workplace and increased value of education in families are those factors that were typical of most studied Roma graduates. Lukács emphasize that Hungarian is the first language of most Roma graduates (or Roma who were higher education students at the time of the survey) or at least they speak Hungarian on native level. The mentioned background factor cannot guarantee social success but can give higher chances for graduated young Roma to successfully enter the labour market and become useful members of the society.

According to the above described observations at first sight the sociocultural conditions of Hodász, and the intersectional social situation (Vincze 2012, 73) determined that young Roma cannot be successful in higher education. With their success they disproved the difficulties of their circumstances, therefore sociologists should find answers to their outstanding performance (cp. Nyíró and Durst, 2018).

Hereinafter we discuss in details the successful further education practice which determine the integration processes of young graduated Roma in Hodász through three case studies.

Roma kindergarten teacher of the year

In 2020 I made a documentary titled *We can learn a lot from each other... with* my colleague Gábor Biczó from an anthropological aspect about the contemporary social and cultural processes of Hodász and Hungarian-Roma local coexistence relations (Biczó and Szabó, 2020b). One important character of the film is G.R., a young woman who was born in Hodász and has a kindergarten teacher degree. Her background meets the above-described

characteristics of the average Roma College student (HR2020), however, she has already been working as an entrance with a degree in 2020 at the time of our survey, therefore she was not involved in our research. She grew up in a tradition-following Vlach Roma family, which means that their parents raised their daughters for traditional woman roles keeping the protocols of Roma culture. Her mother tongue is the Cerhari dialect of the Romani language, she has learnt the Hungarian language in the kindergarten. Besides keeping the traditions her family started to support education which is a kind of distancing from local traditions. According to local Vlach Roma traditions the education of girls was taboo, especially moving into dormitories, because in that case they are no longer under the control of male family members (Biczó, 2019).

„Our father didn't bring us up to marry at the age of fourteen and he argued a lot with my mother on not to send us too far, and what would happen with us in the “big world”. So, our father convinced our mom that we definitely have to study further, because if we want to break out and have better existence for ourselves, then we have to study. So suitors came in vain, my father refused all of them, and in the case of my younger sister as well.” (Biczó and Szabó, 2020b)

Her mother brought up G. R. and her two sisters alone under narrow financial circumstances. They lived on the edge of one Roma segregates, from where even reaching the centre of the village was difficult.

„Her mother, Gina's mother started working at the age of ten and has four grades of elementary school and she had to work very hard to provide their daily bread. And she must be a man and a woman at the same time. So breadwinner and mother in one. For her it was easier to say that there is a way out from public work and your daughter can get on better in life. And you can give her an easier life. The question for her was doubt was how she could finance it. And I am very

grateful for her to believe that there is always a solution, and we are going to solve problems together [...]” (Biczó and Szabó, 2020b).

After successful graduation G. R. started to work as a kindergarten teacher in the local kindergarten. She won the REYN-award of Roma kindergarten teacher of the year in 2022. This means that her exemplary life, activity and work became acknowledged not just locally but on national level.

G. R. lives in a mixed marriage, his husband comes from a local Romungro community. This previously inconvincible relationship also represents that the cultural differences of local ethnic sub-communities do not create problems in everyday life.

Supporter from supported

In 2022 another documentary was made with different aims and other young Roma graduates. Our view was that there are young Vlach Roma graduates who can serve as a role model, and the introduction of their example can serve as a practical and successful tool to soften the stereotypes of Hungarian majority about Roma.

The main character of our documentary titled *What would have been if...*, R. L. can serve as an example for young people with similar disadvantages and/or Roma origin, his life is creditable for the majority as well. The documentary introduces that despite the difficult circumstances anybody could become a successful, responsible, exemplary intellectual (Biczó and Szabó, 2022).

R. L. is a young Vlach Roma man, graduated in social pedagogy in 2022. He has already been working in his profession during his studies. His background did not predestine such a successful life, he was very young when his father was sent to jail. Then his mother raised him and his younger brother alone. They drifted into poverty.

„Looking back from now, as children we laughed about, she cooked outside. But if I think it through

now, there was no other option. She cooked for us outside, she heated water at the fire pit, she cooked there. Because we didn't even have the money to buy a gas cylinder. We had electricity from our neighbour, so at least we could use a heater or something in the winter. I have been bullied a lot because of this at school, because I couldn't buy new clothes, or my mother, or new shoes or whatever. She still sent me to school in clean clothes, she rather washed it with her hands. But, yes, I remember taking a bath in a basin and she heated water like that. So, those were tough times" (Biczó and Szabó, 2022).

His mothers' supportive attitude towards education played a significant role in their life. She deliberately aimed to educate his sons in suitable schools. Thus, they did not learn in the local elementary school, which is characterized by spontaneous segregation processes, but in the hope of better educational conditions and future chances they went to school in the neighbouring settlement.

„We were admitted to school and then different atrocities came from children. I had no seatmates because we don't sit next to the Roma, because smells bad, because he is black. And things like that. From teachers as well, the feeling, that somehow the diary always opens at your name. It doesn't matter on which side of the diary you are, it always opens there. And I got to know this feeling there, that it doesn't matter how much you know, it will never still be enough. This feeling lasted for long, I was beaten many times for being a Roma in that school. Some children beat me badly in the schoolyard. I was hurt and bullied constantly, but I came home and said nothing at all. My mother was there, she was sick. I don't want to bother her with my little problems. That's how I thought about it." (Biczó and Szabó, 2022)

In the meanwhile, it turned out that his mother had cancer, doctors couldn't save her, so R. L. lost her when he was only ten. R. L. had to face early the stereotypes about his origin, which often

manifested in physical abuse. According to his narrative he often became the victim of racism, school abuse and discrimination by teachers. Meantime his father served his time in jail and raised his two sons at in the beginning alone, then together with his new partner. Despite all the difficulties he decided to study further after secondary school. His teachers and the school director played an important role in this decision. After graduation R. L. successfully overcame every difficulties and works in his profession at the moment. He is satisfied with his life, he is independent, cultural differences cause no problem in his mixed Hungarian-Roma relationship.

R. L. proved himself, to his family and his teachers: to those who believed in him and who did not. „She [his form teacher at elementary school – H. Sz.] constantly strengthened in me that I will be a jailbird. I won't reach anything in my life. She mentioned it multiple times in front of my class." (Biczó and Szabó, 2022).

The life of R. L. well-represents how a multiply disadvantaged person could become a professional helper of others in similar situation.

Career advancement and identity crisis

The subject of our third case study is a married couple from Hodász with Vlach Roma origin. The wife K.R. grew up with her parents and two siblings in one segregate of Hodász. Vlach Roma woman roles defined her upbringing in her family. They lived in closed communities, education and knowledge were not integral parts of the traditional values and norms of older generations. On the other hand when K.R. went to secondary school one of her older sisters broke with family traditions and became a higher education student.

„And when we went to secondary school I didn't care about further education, about I would like to go. I just cared about my final exams, and let come what may. Then my older sister and our cousins

said that they would like to continue their studies. But I didn't really care about it, do what they want. I always cared about the moment. At first they were not allowed to move into dormitory, only to enter college. Usually, girls are not allowed to live in dormitories because of our traditions. [...] But finally my sister wanted it so badly that they had to agree." (Biczó and Szabó, 2021).

Present-oriented thinking is an important characteristic of Roma communities. Future planning appears differently than in the case of social majority. However models of her family had greater impact on K.R., thus she also decided to study further. She graduated as infant and early childhood educator. At the moment she is at home with her second child.

After graduation finding a proper workplace was difficult and according to her narratives it mainly had ethnic reasons. K. R. could find a job in her profession after one year of unemployment.

The husband M. R. grew up in the middle of a segregate, under narrow circumstances. Entering higher education after his final exams was a conscious and planned decision. He completed a youth career guidance training, at the moment he is studying romology on a correspondence course. He could not find a job in his profession until now, so "at the moment I have a grocery, my mother is the employee. The grocery was established a few days ago. This is a former store, it was a thrift shop, I could open that with the support of a tender. I managed to open that shop with the help of youth entrepreneurship support program. And a certain time has passed, it was possible to change, and I thought that food would work better than clothes in this area" (Biczó and Szabó, 2021).

In their case after graduation social mobility stalled, fell through, because they could not move away from their original environment. There are no available positions that suit their professions and provide stable income in the neighbourhood of their segregated living environment. Their life is

characterized by permanent struggle and striving after moving into urban area. A documentary was made about their story in 2021. The film represents the special situation of young Roma intellectuals, i.e., they as many other Roma graduates can stuck in a special situation which can be described as a permanent transition between the interfering force of their environment and the intention of integration into social majority (Gulyás, 2021). „Here in Hodász, apart from the fact that we have this house, we are building, we never going to find a more proper workplace. So we don't want to stay, and don't have reasons to live here. Only our family binds us here. But I think anywhere we go, we will visit home [...] A lot of things happen in my life that pulls me back [...] at home I can't evolve, which plays an important role in it, because my role is different. [...] Maybe this is why my life is inconvenient here. I think this is why, because it is hard, really hard for me to live here." (Biczó and Szabó, 2021.)

Summary

With the study of the above described three cases and the life of other young Roma graduates from Hodász we can draw important conclusions about the factors which play key roles in the development of the special local social integration practice of the Vlax Roma community. We hope that we can find answers how a Roma population live mainly in segregated environment in a disadvantaged region can have such a high number of intellectuals.

If we list the above introduced special and in similar environments partly occurring factors we can see that their effect cumulate. We can say that family background (Feischmidt, 2008), supporting attitude of schools (especially the Biri secondary school), the power of special local sample, additionally the presence of personal determination are those factors and characteristics that can lead young Roma to intellectual professions.

Comparing the results of Ágnes Lukács (2017) with our sample from Hodász we can see that the disadvantaged situation of the village fundamentally determines the opportunities of its inhabitants. Despite of this the rate of local Roma graduates in the community is growing. One important reason of this process is that parents see the value of education and despite of their narrow circumstances they support higher education of their children as a “good investment”. Another important factor is, that we identified a strong, convergent system of relatives among Roma in Hodász living in closed communities. The intention to follow the model of other families had motivating effect. According to the narratives of the interviewee the inner models of families function as motivation factors. Nobody wants to fall behind the others, therefore they educate their children.

It is interesting to observe the temporal evolution of the process in Hodász. The first Roma graduate, late Mrs Rézműves, who took a step forward with self-effort and the support of church played a key role. Most of the young Roma who graduated in 2016 as kindergarten teachers went to the settlement kindergarten that was founded by her. Later the five Roma kindergarten teacher served as a role model, which inspired some young Roma to continue their studies.

„The community handled quite well that they entered higher education, however that they finished it, not so well. There was a negative response. When you throw a rock into a lake, the water starts to ripple. The same thing was noticeable here. With entering higher education, they have seen other parts of the world as well. They came to know new rules, new roles. They changed their style, communicated differently, behaved differently, dressed differently. And here the members of the community mainly saw appearances. That she plays a part. She graduated, so why she is so special. There was a kind of jealousy and they watched them

appraisingly. Both the community and young graduates had to learn how to deal with it. I say hats off to each graduated Roma child who learnt to identify oneself.” „Mainly they took up a position where they spent their trainings, where their work could be evaluated, there the feedbacks were very positive and they got employment contract, so they all started to work there.” (Biczó and Szabó, 2020b).

Based on the above-described observations in the case of segregated, disadvantaged Roma communities living in poverty mobility (that determines social integration processes) significantly depends on education level. Supportive environment can provide some of the conditions that are needed to reach this success. Besides, as the example of Hodász represents, the evolution of inner motivation mechanisms of involved communities is necessary. In the case of Hodász, the changed way of living and formation of new norms due to the practice of Greek Catholic religion played important role in the process. Furthermore the prestige of education in the closed system of families was also a crucial reason of the relatively high number of graduates.

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MÓDSZERTANI TANULMÁNYOK / METHODOLOGICAL STUDIES

**THE EFFECTIVENESS OF ETHICAL LEADERSHIP ON EMPLOYEE PERFORMANCE:
SYSTEMATIC LITERATURE REVIEW**

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Abstract

This paper's goal is to develop an appropriate systematic literature review of the research that has investigated how ethical leadership affects employees' performance within an enterprise. The growth of multinational corporations provides a new dimension to the investigation of leadership that takes into account the effect of diverse country cultures. This systematic literature review analyzed publications and articles published within the last decade (2009- 2020). Based on the overall research of the 19 analyzed studies top managers, leaders, and supervisors are supposed to set a good example for their team members and employees by modeling ethical behavior. The effectiveness of top managers and leaders on employees and their performance has been thoroughly investigated in many research. All hypotheses were supported by the data collected from 19 papers, which showed that ethical leadership improves employees' in-role job performance. These findings have important research and practical consequences. Additionally, since ethical leadership is seen to be essential in enhancing the accepted business strategy in the achievement of organizations' objectives and goals, this research will concentrate on the effects of an ethical leadership style on the performance of employees.

Keywords: Ethical leadership, Employee performance, organization culture, Systematic Literature Review.

Discipline: leadership theory

Absztrakt

AZ ETIKUS VEZETÉS HATÁSA A MUNKAVÁLLALÓK TELJESÍTMÉNYÉRE: SZISZTEMATIKUS SZAKIRODALOM-FELDOLGOZÁS

A tanulmány célja, hogy a szisztematikus szakirodalom-feldolgozás módszertanát alkalmazva, választ kapjon arra, hogy az etikus vezetés milyen formában befolyásolja a munkavállalók teljesítményét. A kutatás során a 2009 és 2020 között, a témában angol nyelven megjelent 19 tudományos munka elemzésére került sor.

Kulcsszavak: Etikus vezetés, munkavállalói teljesítmény, szervezeti kultúra, szisztematikus, szakirodalom-feldolgozás

Diszciplína: vezetéselmélet

Introduction

Governance of corporate professional culture plays a significant role in the world of business and is an essential component of organizational success from an anthropological and business perspective. The new values in today's world have imposed many challenges in front of business organizations, the most important of which is the ethical view and the social responsibility entrusted to them. Leadership, like so many fields in applied ethics, leadership has its own set of problems arising from the roles that leaders perform as well as their obligations to followers and other people. (Ciulla, 2018), especially in the relationship between the leader and employees and based on the role of the leader manager in practicing values based on justice, integrity, honesty, and objectivity in distributing tasks and duties, performing tasks, and evaluating employees (Bouckenooghe et al., 2015; Ruiz-Palomino et al. 2011). Furthermore, leadership is ethically difficult and challenging because it demands the leader to control himself, his ego, and his use of power (Ciulla, 2018).

In the management literature, morality and ethics have received much more attention in the contemporary business context. Emerging companies today contribute significantly more to the

creation of substantial personal benefits and organizational profitability. Businesses across the globe would gain greatly from the new concept, which obliges them to adopt moral and ethical considerations as essential tools for the health of their firms. Both public and private businesses should adopt the concept of ethical leadership to achieve global socioeconomic expansion in order to fulfill the expanding demand for workplace and organizations ethics. Furthermore, today's business leaders need to rethink and reevaluate what they are offering, how they operate a business, who might be new participants to achieve better performance, new services, products, and so on (Guo, 2022).

Anthropology is a social science that investigates how people's social environments affect their emotions, values, attitudes, performance, behaviors, and other aspects of their lives (Tian & Zhou, 2012). Since this frequently takes place in a cross-cultural setting, anthropology frequently has a comparative and global focus.

Anthropology and business are intimately connected and impossible to disentangle because modern business is tightly tied to cultural development, technical change, and societal advancements. Business anthropology became popular and was

first applied in the late nineteenth century (Baba, 2012), Business anthropology's significance has expanded rapidly since the 1980s, both within the field and outside of it in the realm of public life (Jordan, 2010). It has also been demonstrated that traditional anthropological research techniques such as ethnography, interviews and observation suitable for business research (Walle, 2002).

An anthropological approach to leadership studies allows the use of research tools and methods that seriously consider socio-cultural dynamics. Leadership principles are primarily universal and for that reason do not pay too much consideration to the functioning of local culture and society and its organizational impact (Johnson, 2007). However, modern business is closely linked to the cultural and social determinants of producers and consumers. It is for this reason that the anthropological research method of exploring these specific contexts is increasingly becoming the focus of contemporary management science.

The application of anthropological research methods can help business leaders and administrators to foster better working relationships among employees who are increasingly likely to represent different cultures, religions, age groups, ethnicities, and genders in the global business world. Of course, the complexity results from the fact that different ethical precepts are held by people from different cultures, and that many ethical concepts are not generally accepted. While everyone agrees that murder, theft, and other morally wrong actions are wrong, attitudes on other matters, like the ethics of animal testing, vary depending on one's faith, society, as well as individual beliefs. Additionally, there may be occasions when it runs against to one moral concept and another. For instance, you might cherish freedom of expression, but what if an employee uses it to offend others? Therefore, upholding one's ethical beliefs while being cognizant of the complexity of some ethical issues, being

considerate of the various viewpoints of the workforce, and being capable of resolving conflicts are all components of ethical leadership. So how can moral leaders uphold moral principles while in office and how do they foster an environment where such principles are respected?

Leadership in various cultures by being aware of the rules, principles, and methods of decision-making. This approach is advantageous for organizations that operate in multiple countries because it aids in the development of an understanding of how to interact with colleagues from various backgrounds. Furthermore, a better understanding of colleagues' national cultures can aid in the creation of workplace unity and harmony. For example, when employees understand their colleagues' cultural norms, they can be more sensitive to understand the differences in communication styles.

Organizational leaders and staff members must be aware of the variations and parallels among cultural expectations when performing their jobs (Resick et al., 2006). The leader is viewed as the center of a company's strategy because all policies and operational procedures implemented later by a leader in the business will affect perceptions, culture, and the organization as a whole in the future.

Leadership is recognized as a key factor that indisputable influences employee performance in any sort of business (Ogbonna & Harris, 2000). However, researchers and academics have disagreed over how workers respond to different styles of leadership (Gadot, 2006). Effective leadership, according to Detert et al. (2007), assists staff in identifying and sharpening their contributions to the organization's success. Even though many leadership theories have been proposed to date professionals and scholars are still searching for solutions to failed leadership.

The growth of multinational corporations provides a new dimension to the investigation of leadership that takes into account the effect of diverse country cultures.

Attention had to be directed towards another type of modern leadership style, which is the "ethical leadership" style. Ethical leadership is an unclear notion that includes several different characteristics (Yukl & Becker, 2006). A recent theoretical concept of ethical leadership has been suggested that may provide a solution (Brown et al. 2004; Trevino et al., 2003).

Ethical leadership represents standards and principles that are essential behavior for leaders since the ethical leader is the one who carries ethical messages that influence the views and behaviors of others through their awareness of the moral advantages that he possesses. This is linked to the mutual trust between him and his employees and is based on acting with integrity and honesty and taking fair and balanced decisions according to clear evaluation criteria, in addition to instilling a spirit of responsibility and commitment among the workers as their awareness of these ethical values indicates the controls of actions to carry out the required performance and positive interaction.

The most significant resource for a company is its workforce; without them, goals and objectives might not be achieved. Employee performance, according to Mwita (2000), is a crucial multi-character factor that aims to produce results that are closely related to the organization's predetermined goals. Employee performance can increase under ethical leadership, according to studies (Bello, 2012). Numerous studies have been conducted to evaluate how ethical leaders might enhance workforce productivity. Ethical leadership may act as a mediator in the relationship between corporate culture and employee outcomes, (Toor & Ofori 2009).

Despite the growing emphasis on ethics in business, the results of ethical leadership have only been the subject of a small but growing number of scientific studies. Even little is known about the psychological processes that underlie moral leadership. In fact, the psychological mechanisms by

which a leader's motivating impacts affect followers have received relatively little study in the leadership literature as a whole. This is unfortunate because research into these processes can advance both our knowledge of ethical leadership and our efforts to produce ethical leaders and employees.

The broadest definition of ethical leadership is the adoption of moral behavior, motivating individuals to start both direction relationships communication and making decisions (Brown et al., 2005).

Ethical leadership improves organizational performance by incorporating moral principles into an organization's processes. An individual's behaviour and deeds are strongly influenced by the development of appropriate ideas, values and beliefs (Rabie & Malek, 2020).

For leaders to be resilient, consistency with moral principles is essential. A leader's moral character is just as important as their managerial skills and strategic influence. According to the claim, ethical leadership is about having people in positions of authority who are morally accountable, visionary, and honest (Sharma et al., 2019). However, this ethical component affects the conduct of the employees and staff members, affecting their motivation, satisfaction, and performance.

In the present paper, we deal with a systematic literature review. The systematic literature review method makes it possible to combine and reinterpret the findings of investigations that are carried out independently by several researchers on a certain topic. As a result, research conducted on a particular topic at various times, locations, and sample sizes can be examined holistically, leading to more reliable conclusions. According to Greenhalgh's (1997) definition of a systematic literature review, it is an examination of the literature that uses simple, repeatable procedures to comprehensively examine all relevant contributions on a particular topic. The investigation of ethical leadership in relation to employee performance is examined in this existing systematic review from

the perspectives of the research questions, research hypotheses, research language, and year of publication. The subject of ethical leadership is handled in various organizations. In this context, the findings of studies undertaken in firms over the previous decade to investigate the relationship between ethical leadership and employee performance have been synthesized. Therefore, to give a thorough analysis of the data gathered, the following research topic will be studied in this review. The question is: “Is the ethical leadership style affect employee performance?”

Methodology

Systematic Literature Review (SLR) is frequently compared to traditional literature reviews due to being objective, repeatable, systematic, complete and because the method is presented in the same way as for conducting empirical studies (Weed, 2005). Systematic Literature Review (SLR) originates in the fields of health care, medicine, and public policy, where it has been used to assemble the most credible evidence to apply to decisions on clinical practice and public policy. (Cook et al. 1997; Tranfield et al. 2003). A systematic Literature Review (SLR) is used in leadership and management to give openness, simplicity, accessibility, as well as impartial and comprehensive reporting on a particular subject (Thorpe et al. 2006). According to Klassen et al. (1998), a systematic Literature Review (SLR) is “a review in which there is a comprehensive search for relevant studies on a specific topic, and those identified are then appraised and synthesized according to a predetermined explicit method”.

Search Strategy and Data Sources

This study used a systematic literature review method, which is a secondary study approach in which all relevant studies relating to a topic domain

are identified, explored, and interpreted (Webster & Watson, 2002). Several databases, including Science Direct, Research Gate Elsevier, and Springer, were selected to narrow the scope of previous research on the effect of ethical leadership on employee performance and increase the chances to find relevant studies. Google Scholar and Google Search are also used to conduct a broader search on topics. The research used ethical leadership, impact, and employee performance as keywords to carry out the automatic search in the databases.

Inclusion and Exclusion Criteria

The chosen publications and articles that will be examined in this systematic review ought to include the following:

1. Research in the field of ethical leadership and its impact on employee performance.
2. The studies that are published in English between (2009-2020).
3. The articles whose sample consists of employees, supervisors, managers, and employees working in different organizations. However, in this study, only one master’s thesis and articles published in journals were included in this systematic literature review.
4. The ethical leadership issue in all types of businesses is addressed in this study.

Articles were excluded if the article failed to address the effect of ethical leadership on job organizations’ performance and employees’ performance or if the abstract, findings or discussion parts of the relevant study failed to include any of these four basic elements.

Sample

The key words listed in the section above on inclusion and exclusion criteria were used to locate papers and publications. In total, more than 23

articles were gathered; however, after duplicates were removed, there remained 19 quantitative studies from samples from various countries that met the initial inclusion criteria.

The majority of the study samples came from business organizations in the both public and private sectors and across a range of industries, with only a few examples from other contexts such as universities. The sample sizes were very different, with participant numbers ranging from $n = 62$ (Toor & Ofori, 2009) to $n = 677$ (Khuong & Quoc, 2016).

Although the focus of ethical analysis in all studies and searches is a hierarchical leadership level, for example, CEOs, Managers, Leaders, and Supervisors, all these levels are hereafter in this research referred to as “leaders” —to be simplified, where the distinction is not relevant).

In this paper, the sample was identified as 1. Sample size in this paper was defined as the number leaders and supervisors in two studies.2. Sample size was defined as the number of employees and followers (10 out of 19 studies). Furthermore, 7 studies targeted both employees and leaders to evaluate the effect of leaders’ ethical leadership on the performance of their employees.

Leadership Questionnaires

In summary, in terms of ethical leadership, all of the studies used Brown et al. Ethical Leadership Scale (2005), after the development of the Ethical Leadership Scale (ELS) by Brown et al. (2005), in studies with a quantitative approach, the vast majority of researchers employed this instrument. Ethical Leadership Scale (ELS) items' content can be characterized as deontological and morality in nature, with specific formulations of the significance of values, moral and ethical principles in Ethical Leadership (e.g., “Sets an example of how to do things the right way in terms of ethics”; “Has the best interests of employees in mind”;

“Conducts personal life in an ethical manner”, or “Defines success not just by results but also the way that they are obtained”). As was previously mentioned, contributions to this field of study mostly consist of emphasizing the significance of Ethical leadership based on its effects.

Employees’ performance Questionnaires

Most studies had seven items adapted from various scales of extra-role performance (McNeely & Meglino, 1994; Van Dyne et al., 1994; Moorman & Blakely, 1995; Smith et al., 1983). And a 5-item scale originally developed by Williams and Anderson (1991), and later extended in the Chinese context by Hui, Law, and Chen (1999) was utilized to measure task performance.

Result and Discussion

The main results through the analyzed studies and articles are as the following (shown this in table 1)

Ethical leadership has a direct and indirect effect on the employees’ performance. It was supported by most, if not all, research those 19 publications that were selected and gathered all agreed that there was, in fact, a direct and indirect positive relationship between ethical leadership and employees' performance.

Furthermore, employees perform their best when they are properly treated; this conclusion is supported by practically all of the publications that show that performance improves when employees are treated well. As predicted, the impacts of ethical leadership on employees' performance are moderated by loyalty, trust, commitment, job security, and efficiency. The theoretical contributions made by this study to the connection between ethical leadership and employee performance are significant.

Table 1. Result data table of included articles. Compiled by the Author.

Author /year	Content of sample	Results
Zehir, C., & Erdogan, E. (2011)	employees	Ethical leadership effect positively and directly on employee performance
Bello, S. M. (2012)	leaders	Ethical leadership effect positively and directly on employee performance
Khuong, M. N., & Quoc, T. H. (2016)	employees	Ethical leadership's effect positively and directly on employee performance also has a positive indirect effect of ethical leadership on employee job performance through employee job satisfaction and employee work motivation
Sheraz, A., Zaheer, A., & Nadeem, M. (2012)	leaders	Ethical leadership mediates the positive relationship between organizational culture and employee performance ethical leaders promote a supportive culture in organizations.
Ponnu, C. H., & Tennakoon, G. (2009)	employees	There is a significant relationship between ethical leadership behavior and employee's organizational commitment and positively associated with employees' trust in leaders which effect indirectly on employee performance
Park, C. H., Kim, W., & Song, J. H. (2015)	employees	Ethical performance and leadership effect directly on employees' behavioral performance, also ethical leadership has a positive indirect effect on performance through psychological ownership
Malik, M. S., Awais, M., Timsal, A., & Qureshi, U. H. (2016)	employees	Ethical leadership has a positive direct impact on the performance of employees
Shafique, I., N Kalyar, M., & Ahmad, B. (2018)	employees	Ethical leadership effect directly employees' performance and indirectly through employee job satisfaction
Liu, J., Kwan, H. K., Fu, P. P., & Mao, Y. (2013)	employees and leaders	Ethical leadership positively directly affects employee performance, also indirect effect through workplace friendships and subordinates' traditionality.
Weng, L. C. (2014)	employees and leaders	Ethical leadership and behavior are positively and directly associated with the service performance of their followers.
Bataineh, M. T. (2020)	employees	Ethical leadership has a positive and direct effect on employee job performance
Toor, S. U. R., & Ofori, G. (2009)	employee	Ethical leadership positively and directly affects employees' performance and outcomes.
Kelidbari, H. R. R., Fadaei, Ebrahimi, P. (2016)	employees	Ethical leadership affects employee performance positively and indirectly through intermediary variables such as leader-member exchange, self-efficacy, and organizational identity.
Mo, S., & Shi, J. (2017).	employee and leaders	Ethical leadership effect employee task performance positively and indirectly mediated by trust in leader and surface acting.
Bouckenooghe, D., Zafar, A., & Raja, U. (2015)	employees and leaders	There is a positive indirect relationship between the ethical leadership of the leaders and followers' in-role job performance, through mediator factors such as follower-leader goal congruence and psychological capital.
Ahn, J., Lee, S., & Yun, S. (2018)	employees and leaders	Ethical leadership directly and positively affects employee performance.
Kang, S. W. (2019)	employees and leaders	Ethical leadership effect positively and indirectly on followers' work performance mediated by followers' perceived salience of the ethics code
Yates, L. (2011)	employees	There is a positive indirect relationship between a leader's ethical leadership and employee job performance, through mediator factors such as job satisfaction and organizational commitment.
Obicci, P. A. (2015)	employees	There is a positive and direct effect of ethical leadership on employee performance.

The systematic literature review results revealed that ethical leadership positively affected employee performance. When ethical leadership studies were examined, it was found that ethical leadership is associated with employee performance. However, there are ongoing discussions as whether this effect on student achievement is direct or indirect. Although some studies support that ethical leadership directly affects employee performance (Sabir et al., 2012), there are also some studies concluded that it has an indirect effect on employee performance (Khuong & Quoc, 2016). According to the findings of the systematic literature review, ethical leadership has a positive impact on employee performance. When studies on ethical leadership were examined, it was discovered that ethical leadership is related to employee performance. However, there is an ongoing debate about whether this effect on employee performance is direct or indirect. Although some studies support that ethical leadership directly affects employee performance, others conclude that it has an indirect effect on employee performance. According to (Sabir et al., 2012) ethical leadership, when practiced, can have a significant impact on employee performance. Previous research has shown that ethical leadership leads to self-sufficiency, employee motivation, and self-reliance wisdom, which leads to performance maintenance and achievement of the organization's goals. As a result, employees who are authorized by ethical leadership can be productive and raise the organization's performance level. Leaders should possess the moral principles, interpersonal skills, and capacities to complete many jobs as required by the organizations. Today, ethical leadership can help to build a moral society, and effective teams, increase employee and organizational performance and create a positive image of the country on a global level.

The components of work ethics enhance the employee's performance on the job (integrity,

equality, responsibility, and self-discipline). Additionally, all auditors should receive pertinent information from the company. To put it bluntly, managers should have authority over their staff, treat everyone equally, and rely on their team members to self-monitor the work they are given. (Bataineh, 2020). It has been suggested by Toor and Ofori (2009) that ethical leadership could play the role of a mediator in the connection between organizational culture and the outcomes experienced by employees. According to the findings, ethical leadership has a greater likelihood of resulting in greater leader effectiveness, employee willingness to put in extra effort, employee job satisfaction, and an environment climate that fosters the flourishing of ethical leadership, all of which lead to improved employee job performance.

Limitations

Despite the disciplined approach taken in conducting this systematic literature review, there may still be some limitations. This paper limited its search to English-language published articles in journals that were reachable and accessible by the authors' university library system. Thus, this systematic literature review did not include dissertations or articles published not in English but in another language. With the apparently global interest in ethical leadership that this research highlighted, it's possible that additional empirical studies are being published in another language that would support or refute some of the findings from this analysis. There are a few systematic literature reviews that may be used to evaluate the research methods employed in other disciplines, such as qualitative inquiry and cross-sectional investigations. A second limitation has to do with the lack of studies that use the anthropological approach and qualitative method no studies focused on the differences in ethical perspective would affect ethical leadership and employee

performance. All research in this review shares the common goal of examining the effects of ethical leadership. To stop unethical acts from occurring, it is essential to understand the causes of EL, but this field of study is still underdeveloped.

Implications for Future Research

More studies are required that focus on studies that use the anthropological approach and qualitative method no studies focused on the differences in ethical perspective would affect ethical leadership and employee performance. Furthermore more studies are required to bring a new dimension to the study of leadership by taking the influence of various national cultures into account.

Conclusion

This systematic literature review paper is scholarly and contemporary on the studying of the effect of ethical leadership on employee performance have been able to develop a real knowledge of some of the measures that should be managed to gather in the system to guarantee better performance at the workplace. The employees feel respected and appreciated when they are treated well and care is given. This approach will be essential in making sure that the employee can provide and perform better. According to the logic presented in the papers analyzed, it is ensuring employees can participate in the policies established in organizations is essentials essential to ensuring that they can appreciate their work and are motivated to do it. Organizational change strategies should put the employees at the forefront.

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HOW THE MASS MEDIA AND THE PUBLIC DISCOURSE AFFECTS INTENTIONAL COMMUNITIES: AN ETHNOGRAPHIC STUDY

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Abstract

The paper explores the journey of an organization that is a small intentional community, whose objective is to contribute to the new forms of sociality as well as the artistic and cultural life of the youth in the city of Tetova in North Macedonia. For the sake of better comprehension concerning how mass media can affect the public discourse, a case study is examined of a recent incident that happened in the community. The methodology used for this study is applied anthropology as a practice, which involves a problem-solving approach that draws on the knowledge and skills of anthropology to develop culturally sensitive solutions to the challenges this community faces.

Keywords: local community, mass media, public discourse

Discipline: anthropology

Absztrakt

A MÉDIA ÉS A KÖZBESZÉD HATÁSA A LOKÁLIS KÖZÖSSÉGEKRE: EGY ETNOGRÁFIAI ESETTANULMÁNY

Az alkalmazott antropológiai profilú kutatás az Észak-Macedóniában található Tetova város lokális közösségének vizsgálatával foglalkozik. A tanulmány arra vállalkozik, hogy etnográfiai perspektívából mutassa be a média és a közbeszéd hatását egy közösség mindennapi életvitelére.

Kulcsszavak: lokális közösség, média, közbeszéd

Diszciplína: antropológia

In contemporary society, a "social movement" is often defined as an organized group of people who get together to promote a particular cause or issue with the goal of bringing about social, cultural, or political change. These movements or communities usually emerge in response to alleged injustices or imbalances in society, and their objectives are to raise awareness of these issues and motivate change.

Since modern social movements rely heavily on symbolic politics to challenge established power structures and create new forms of collective identity and purpose, as it is emphasized by Melucci (1996; 1989). It is important to consider the social-political reality in which these movements and communities perform. For the continuous development of the performance and operations of these kinds of communities, public discourse, which gives both individuals and groups a forum to express their concerns and promote their causes, is essential. Through it, members and activists of the community can create a feeling of shared purpose and identity by participating in conversations and debates about topics of public interest. As people learn more about the problems affecting their communities and are inspired to act, public discourse can also encourage civic engagement and participation.

In this paper, I will briefly explore the journey of an organization that is a small intentional community, whose aim is to contribute to the new forms of sociality as well as the artistic and cultural life of the youth in the city of Tetova, my hometown, in North Macedonia. Moreover, I will observe the overall phenomenon of the relation of these kinds of initiatives in the country – similar in the whole Balkan peninsula – to the local governments and their responsibilities, understanding, actions, and support concerning this concept.

To better understand how mass media can affect the public discourse, I will examine a case study of a recent and ongoing incident happening to this

community related to the physical socio-cultural space in which they perform.

The incident includes the (new) mayor of the city of Tetova, who, after intending to evict this community from their space - which they found abandoned and renovated consecutively for four years on a voluntary basis - in a press conference, among others, accuses them of conducting pornographic activities.

The occurrence, and what preceded it, went viral in every medium nationwide and regionally in a matter of hours, which on the one hand raised questions regarding the credibility of both parties, the community and the mayor, and on the other gave enormous visibility to the small community, with their publicity going up on their social media channels. With this happening, the community got a chance to be heard, and suddenly the whole country (and even region) learned about them.

The public discourse started to shape the whole incident in a way that the community felt obliged to justify themselves for this accusation, in more serious ways in the beginning, until it started to become more humoristic and sarcastic while ridiculing these accusations.

Social Cultural Space Tetova

- The Community

Social Cultural Space Tetova is, according to its members, a community of independent people who interact, create, and cultivate the natural human culture of functioning in equality. They work and act in the city of Tetova, my hometown, in North Macedonia. For a better understanding of the context, it is important to present a short background about the city, which is the second largest city in the country, only 30 minutes' distance from the capital (Skopje), with an urban population of more than 60,000 citizens according

to the last census of 2021, however, the metropolitan area extends to over hundred thousands. In the past 15 years, the city has had two emerging universities that attract a number of young students from other cities and countries in the region. Nevertheless, the city's public and private cultural institutions offer few to no alternative cultural and recreational activities.

The city's population is ethnically and culturally diverse, with predominant Albanian, mostly non-observant Muslim majority, as well as orthodox Macedonian Christians and a variety of other ethnic minorities, such as Roma and Turkish communities. Considering the constant systematic transitions in the Balkan region for the past three decades and the post-socialist era, the social realities have gone through different extremities, a process that made it difficult for the cultural reality of the city to develop normally.

The situation affects mainly the youth, who, lacking spaces for creative performances, exhibitions, studios, art museums, cinemas, etc., spend most of their free time in coffee shops, a circumstance that slows down their involvement in social (political) activism. This phenomenon forces society to depend more on one another than on the state or other systems, leading to the formation of collective autonomous survival systems such as community built initiatives, a highly new concept of that form in the region.

The community of Social Cultural Space Tetova was created as a result of an initiative between the Belgian organization Toestand and Termokiss from Prishtina, Kosova. A group of people, myself included, from the city of Tetova, North Macedonia, who, throughout the years with their independent research, activism and work have identified a need for an alternative community and cultural space.

It will unify independent creators from the city and the region to work together towards identifying and solving issues concerning young creators, public spaces, ecological issues, and creating a

culture of community-led initiatives towards solving these issues.

Throughout the years, as an informal group and as part of different projects they have come to recognize the potential of young creators who live and work in the city and the need to bring together this creative force to work towards a common goal: "a better city for all".

The idea behind this community is to bring together not only individuals but also other creative organizations in the city that share a similar vision and provide facilities, human resources, technologies, and equipment for these groups to implement their project ideas; discuss and create solutions involving young people in the decision-making process on the local governance regarding problems that directly concern them - create and nurture movements of alternative culture and art.

Since its creation, this Social and Cultural space has been home to hundreds of young creatives, a highly diverse group of artists, workshop leaders and creatives who live, work or study in the city and have been using this space to exhibit their art, showcase their ideas, organize workshops and create healthy discussions on diverse issues that impact young people in the city and around the world, creating as such, a network of people who communicate and work together towards better functioning communities.

Getting back to the early stages of this initiative, it is of relevance to mention that this project began by getting together around 100 people from Kosova, Belgium, and locals of North Macedonia to reconstruct and transform the old and abandoned building of Radio Tetova, the former radio station of the city, into a social and cultural space (Picture1.).

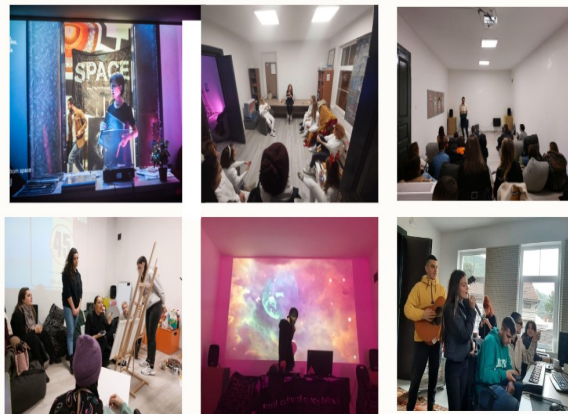
With very little funding from Erasmus+ projects (inquired by the Belgian organization as an EU member state) and no other material income, on a completely volunteer basis, the space was renovated and adapted to the needs of its members.

Picture 1. The ex RadioTetova building in 2018 – abandoned for more than 10 years (Tetova, North Macedonia)



After several years of work and renovations of the building through funding, the space and its members managed to revive the radio station, make an audiovisual production studio, an exhibition space, a small improvised cinema, and a coworking space available, easily reachable, and free to use for the whole city (Picture2). What is more important is that some of these initiatives are a complete innovation in the city; a community space functioning with a flat hierarchy like this has never existed before in the city.

Picture 2. Different activities in the Space after the last renovation (2022)



Understanding a community's self-representation is a crucial process in anthropology, as it provides insight into how they perceive themselves and their place in the world. According to James Clifford, in his book "The Predicament of Culture" (1988), the act of representing oneself is always bound up with power relations and politics. He suggests that the way a community represents itself is not only a passive replication of reality but rather influenced by external forces and an active construction of meaning and social reality. Understanding these influences is crucial to understanding a community's self-identity.

In this act of self-definition and self-representation, there's an engagement toward negotiation with the other, where, according to Foucault (1984), the concept of "the other" does not refer to a specific person or thing but rather to a relationship of difference between the self and something or someone that is perceived as different. This relationship of difference is crucial in defining the self. This developing community describes itself as: „focused on creating new standards and norms of collective functioning that permeate with the needs of the time and the operating circle. On a completely voluntary basis, new and avantgarde events and ideas are created and maintained there, which are always put to the service of the 'space' society and beyond. Public events have an educational and instructive purpose, and in some cases they also present creative forms of protest, but there is obviously also entertainment in a society that is very open to diversity. The essence of any activity is voluntary work, arising from the desire to contribute on behalf of the community and accepting others as equal collaborators.”

The presence of this community in the city questions and challenges the meaning of the conventional institutions and structures of power and governance due to their unique and alternative method of working, which has a significant impact on their surroundings. By seeking to create

alternative forms of social organization, they introduce a more equal distribution of power and decision-making, which is often misunderstood by its surrounding social and political context, which works mostly in a hierarchical and centralized way.

Relations to the local government

The space and its community, as the product of the volunteer work of the active group that maintains it, have their genesis from a spontaneous visit to the center with a similar character in Prishtina, Kosovo, 'Termokiss' in August 2016, when this center was founded. From there started the first incentives and contacts with the autonomous Belgian collective 'Tostand', which with similar projects aims at revitalizing unused and abandoned public spaces, create new spaces in different places every year, locally and internationally. Once they were in contact, the group started to look for abandoned places in the city, trying to find a public space that is not privatized and at the same time, started to reflect through meetings, about the recently discovered concept of autonomous communities that function with a horizontal structure, different from typical NGOs - a very new and unusual concept in the Balkan region. After several meetings with other collectives in the city and also the municipality of the city at the time (2018), the group managed to finally sign a memorandum with the municipality of the city of Tetova, getting in this way the permission for the revitalization and use of a space that is public property under the jurisdiction of the municipality - the abandoned building of the former radio station of the city - and in parallel create "Skatova" the first ever skatepark in the city. The agreement between the two parties, states that the space of the building is given for use by the Municipality of Tetova, to this group of people, while the organization justifies this trust with its full maintenance as well as the organization of ongoing public activities. Due to

the lack of legal opportunities to register as an autonomous collective, this group of volunteers is registered as a non-governmental organization called "Socio-Cultural Space Tetova" but the internal structure appears to be entirely on a horizontal basis with shared responsibilities. Since the facility is public property within the Municipality of Tetova, in order to use the space after revitalization, the practice of signing a memorandum of cooperation every 6 months or a year between the Municipality of Tetova and the organization that maintains the space continued.

During this period, the organized community, through applications and funding, managed to reconstruct the space twice, turning it into a fully functional space. After the completion of the works on the construction site, a complete organizational plan (35 pages) was sent to the municipality for the mode of operation and the anticipated activities that will be held in the premises of "Space Tetova," together with a document of evidence in support of the activities, signed by the residents of the neighbourhood. This fact is important and will be elaborated later on. The organizational plan was accepted and with this the memorandum of cooperation between the community and the Municipality was granted until April 2024.

In the Municipal elections of October 2021, a new (populist Islamic) conservative party won the elections and shortly after, they won the majority in the municipal council as well. Sometime after the new mayor gets accommodated in the institutional premises, the community gets a call for a meeting with him, where during the discussion he asks for the memorandum of cooperation in force that was signed by the previous mayor. After examining it, he decides that this memorandum is not entirely valid because it is not clearly written and it lacks crucial information, so the community members suggest that together they create a new memorandum and in the short term they send the draft

proposal for the new memorandum, to which the cabinet only replies that there will soon be an answer to it. In the following months there were several attempts from a group of young party militants to insert in the space through asking for a separate exclusive office to build the youth municipal council, bringing in European organizations to show them the space as their own etc.

The incident - media pseudo-events

Although there is always room to debate what constitutes a community, researchers define the term as "currently in a muddle" and "used to describe everything from plural organisms to the entire human population of the planet" (McKeown, C. T., Rubinstein, R. A., & Kelly, J. G.).

The concepts of community and the production of it appear to have different meanings in different cultures (1987). In this case, considering the social-political reality of this group, their identification as an intentional community has been widely misunderstood by the mass population, as well as the local governance administrations. This misunderstanding has shown great consequences.

After the newly elected mayor's conservative party secured the majority in the municipal council, they finally started feeling the comfort to freely bring any decisions forward. Mid-October 2022, in a vain official document and without prior warning, disregarding the tireless voluntary contribution of the community, the Municipality of Tetova issued a decision where it requires the group of youngsters within 5 days to release the premises of the Space where they have been operating for 4 years as a community at the service of citizens.

In the above-mentioned document, only the decision is conveyed that the Unit for Culture and Sports of the Sector for Public Activities is determined to be responsible for the coordination of any activity that will take place in Social Cultural

Space Tetova - the Space which was found abandoned for 10 years, revitalized, brought up from zero by renovating and intervening in several instances, and given life in the last 4 years with countless activities and "unsparing voluntary contributions for the good of society", from all members of this community and wider.

Moreover, with this decision, the Municipality of Tetova violates the memorandum signed by itself with the previous administration, whereby the Social Cultural Space Tetova holds the right to use the space until April 2024. To this, the community responded by sending a letter of awareness explaining who they are, what they do and how they function, as it seemed to them that this was not clear to the mayor and the present municipal administration. They also asked the mayor to support them, seriously consider this letter, and possibly meet them for a discussion.

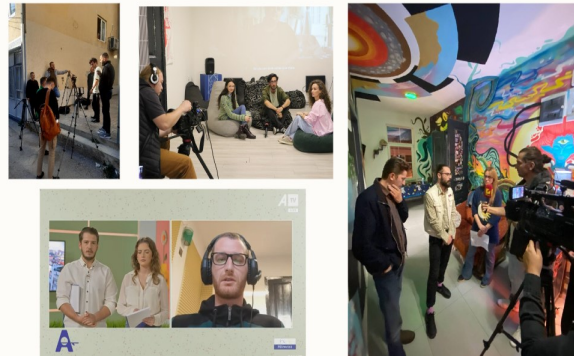
The following days they were invited to two meetings with members of the municipality, whose role within this administration was not clear. Moreover, as members of the community declare "they were smoking inside the office and claiming the space as their own property".

After a week of no response, the community decided to finally go public and share their concern and issue with the wide public, not only through their social media channels but also by inviting the media to their premises and making public declarations regarding their concern (Picture 3).

According to Elihu Katz, a pioneer in communication science, broadcasts are generally referred to as media events. However, he emphasizes that this phrase is vague and overused and he would rather refer to them as the media's "high holidays." He argues that each of these events temporarily revives a society's sense of occasion, and some of them might have had long-lasting consequences (Katz, E., 1980).

The following events had the same effects on the community in question.

Picture 3. The community of Social Cultural Space Tetova giving declarations to the media.



During one of these meetings with one of the country's biggest TV channels, they were invited to join virtually -on live TV- a widely well-known program where the mayor was invited for the first time to discuss his work in the city as a new mayor, without him knowing. In his examination of media event processes, Katz (1980) claims that high drama (or high ritual) must be present, including a wide range of emotional or symbolic elements, in order to capture the audience's attention and make their time sitting in front of their screens worth it. Naturally, this requires that the activities be planned beforehand. Although this 'clash' in the form of an 'element of surprise' was planned and foreseen by the media in question and the community, it was not planned by the mayor. When the moment comes for them to show up on the screen, the mayor is shocked and seems agitated for not being told about this encounter beforehand. He starts addressing the community by saying that he is wondering "who has taught these youngsters to occupy?"

This is where the social drama begins, as the program is being broadcast live on TV and simultaneously on social media, the public starts commenting. Social drama according to Victor Turner (1988) goes through several stages, such as breach, crisis, redress, and reintegration or schism,

which he identifies as "a sequence of social encounters of a conflictive, competitive, or agonistic nature". To put it another way, the social drama starts when a member of the community breaks a rule; people take sides for or against the rule breaker; repairs are made, either formally or informally; and if the repairs are successful, the group returns to normal; if not, the group disintegrates. In this case, the group can be identified as a larger portion of the population - everyone who was following up on the program. If or when a group represents a larger portion of the population, its social drama can have a more significant impact on society. This is because the group's interests and concerns are more likely to reflect the needs and aspirations of a broader cross-section of society. Additionally, the larger the group, the greater the potential for collective action, which can further amplify the group's impact. This was also the impact of the TV appearance of the community as a group, in their space, vis a vis the mayor alone in the studio (Picture4.).

Picture 4. The clash between the mayor and the community live on one of the biggest national TV programs



In these moments of the broadcast, people start questioning the identity of this community that "breaks the rules" and "occupies public spaces"

that they have never heard of before. Some are defending the mayor, while others think this topic is irrelevant, as he should be talking about more important things such as the roads, the traffic and other basic problems the population faces on a daily basis. The clash of the conversation between the two pairs lasted for around 10 minutes, in a not very friendly way, during which the mayor insisted that this community has no more right than any other NGO to use a public space that is property of the municipality, and on the other hand, the community was trying to explain that they were the ones who found the place abandoned 4 years ago and renovated it by themselves on several occasions, serving meanwhile as a bridge between NGOs, informal groups and individuals, creating and maintaining a space for them to meet, function and explore their creativity.

The following two days, the community continued sending emails and letters to the municipality, asking for meetings and possibilities for an agreement, until after three days the mayor decided to do a press conference regarding the problematized issue with the community. In this press conference, where all the national media were present and it was a live broadcast event, the acting mayor of the municipality of Tetova starts the conference with slander and wrong approaches common to the community, the space, and the young people. He also shows a document allegedly signed by residents of the neighbourhood where Space is located, where they complain about noise and excessive consumption of alcohol. Later on, it will be exposed in the media that the signed letter was archived on the same day of the conference, meaning it was forged. The mayor continues to accuse the community of illegal activities within that space, including illegal activities with minors. When one reporter insists on several occasions by asking what kind of activities he is referring to, the mayor very agitatedly replies ‘‘pornographic activities’’ (Picture 5).

Picture 5. The moment the mayor accuses the community of illegal pornographic activities



After a short, shocking silence in the room, cameras start cracking intensively and the reporters and journalists jump in with all kinds of questions, to which he leaves the room.

The group of youngsters of the community who are listening to this declaration are shocked by this deeply offensive statement, in particular, that it came from the premises of the city municipality, according to them ‘‘the temple that should be the first aid in improving the conditions and offers for citizens and young people’’. They start activating by calling all the media to their premises this time, for a response to the accusations. Meanwhile, after requesting information from the police, they find out that the police reports show that until that date there was not even one complaint or any report of any alleged illegal activity at Social Cultural Space Tetova. For this serious disinformation and extreme defamation, the community starts appealing to the competent legal bodies, embassies of friendly countries, civil society and all formal and informal groups, and all free citizens to condemn this insult and accusation, which is unfortunately based, according to them ‘‘on the chauvinism and arrogance of typical medieval ignorance’’.

The attention of the public is completely captured. The social media channels are flooded with comments, questions from all parts of the population, among which supporters and militants

of the (Muslim) conservative party. In some of the most frequent comments they defend the mayor and his accusations of pornography by referring to the activities that are published by the community itself on their social media channels, namely two main activities: one “Healing Sounds: Meditative Concert” where people are laying on the floor meditating through guided healing meditation (people in shorts, leggings and ‘exposing’ clothes); and two, an event called “Peach Preach” - a gala night where women tell stories of their private or professional lives with a specific topic with the aim of breaking barriers and stereotypes in the (very patriarchal) society, while giving women voice and creating a free and safe space for the women to talk about their experiences. The two events are now being massively used to publicly harass the community (and the women involved) in the social media xenophobic campaign by supporters and militants of the party. The strong xenophobic campaigns from online pages and suspicious profiles are publicly suspected to be controlled or in line with the (Muslim) conservative ideology of the party of the mayor (“Besa”), the community declares. According to Cohen A. P. (1985), if we view communal identification as a collective fabrication, we must compare the contrasts and similarities between the community's outsiders and its internal members. The outside supporters of the community also start their campaign. Some define these attacks against the socio-cultural activities of politically independent young people in Tetova as “attacks of political Islam”, whose motives are based on the party's ideology, “created and supported with investments from abroad, more precisely from the eastern Islamic states like Qatar, Turkey, & Co.”. Other motives of the party, stated by supporters of the community are “to attack any organization that does not touch or approximate the spirit of political Islam”; “to attack any organization within public spaces that does not come from a militant or a party close to them” and “to

use this small public space for their financial appetites”. Another technique of support used as a backup to the community is people posting pictures of themselves doing an activity within the Space such as painting, reading, watching a movie, cleaning, etc., with the caption “here is me doing a pornographic activity in the space” and adding the #SaveTheSpace hashtag. This technique proved to push more people to post their pictures and the attention on the social media platform was getting bigger and bigger as newcomers to the space started showing interest in what “Space” was, what they stand for and what they do.

Some days later, representatives of the municipality came to the Space to request the delivery of the key since the extension deadline in the official email had passed. The persons in question state in a threatening manner: “this building belongs to the Municipality, and we will manage it”. The volunteers refuse to give the key without an official document to break the memorandum and without a final resolution of the matter. This practice continued for several weeks until an official email from the Sector for Public Activities arrives, in which the Space community is informed by order that during the period of one week, the spaces of the former Radio Tetova would be used by the Sport and Culture Unit for a collective exhibition of the artists of Tetova for the (national Albanian) November holidays.

The community states in the returned email that, based on their principles of cooperation, it is required to fill out the cooperation form and provide information about the event in question and how Space volunteers can help in the organization. No response was received. Without prior warning, representatives of the municipality come to the premises of Space to check the space where they will hold the exhibition; they ask for a key under the pretext that the works they will bring for the exhibition are very valuable and must necessarily have a key due to responsibility and

they leave by refusing to communicate with the community coordinator regarding the exhibition in question.

The same day later, giving them a chance to cooperate and in full trust, the Space community creates a document where the organizer of the exhibition comes and takes the key and signs the document stating that the key will be returned to the community at the end of the exhibition. During the next few days, space volunteers actively help in the organization of the event - although this help was rejected, the organizers from the municipality came unprepared and necessarily needed the help of Space volunteers, starting from the physical, the use of Space tools, pasting paintings on the wall, cleaning the space, etc. The opening of the exhibition starts, and the mayor of the municipality is also present. In the introductory speech, the municipality's cooperation with the artists' association is mentioned, but at no time Space is mentioned as a community or space in which the exhibition is held. The same happens in the publication of photos from the event by the municipality (the existence of Space and the help of volunteers in the organization are ignored), to which the community responds on their social media platforms. The last day of the exhibition, around midnight, the former vice-minister of culture of North Macedonia, now member of the party (whose role in the municipality remains still unidentified), with several other people changes the lock of the door of the Space and immediately locks everything inside the space including the equipment, personal belongings of the volunteers, and all confidential documents and tools found in it (Picture 6).

The footage is seen through the online security cameras that the community had put there months ago. In the morning, people who had helped change the lock come to stop the security cameras, so the community's access to what is happening inside the space ends here. However, another media

scandal emerges from the camera footage (that the community posts online immediately) as it appears in front of the public as a form of 'theft' from the people, it is being done in the night time, secretly, and moreover by an ex vice minister of culture of the country.

Picture 6. The footage of people from the Municipality changing the lock of the Space around midnight



Conclusion - the outcome

The space is now occupied, and the community has already planned activities for the whole month of November that are on hold. They decide however to make some of the events happen in front of Space, where around 50 volunteers and supporters showed up.

The municipality had engaged several men to block the entrance to the space and had ordered them not to allow anyone to go near it. In an attempt to spoil the event/protest they cut off the electricity in front of the Space so that the community is in total darkness (they think it was done in case of any violent casualties). They then bought candles and stood for 3 hours in freezing temperatures, where they managed to partially fulfil the foreseen activities.

There was poetry reading, discussion, music (from a phone, as all of their equipment was trapped inside the space, including the sound system and the necessary instruments), but unfortunately, due to the street being in total darkness, not every planned activity could be

fulfilled. For a minute, they managed to go near the entrance in order to take a picture with the banner the volunteers had prepared: "Public Space (no key); Private Space (key)"(Picture 7.).

Picture 7. The community has gathered to protest outside of their occupied space.



The idea is mostly to prove their point, and some media analysts and supporters of the community understand it. One of them writes in an analytical article: „This story will not end here, but it will continue - and it will continue for the better because what the initiators of this action do not understand is that the Space is not made by the walls but by the people inside them, that a place is not made by tiles but by ideas, that a community is not held by oppression but by freedom, by independence - therefore 'Space' will find new walls and tiles, while the walls of the former City Radio facility will breathe with shame, or will be covered again by oblivion."

These countercultures, linked to postmodern civilizations, have influenced examples of contemporary occurrences that are comparable to them. In particular in the "tinderbox" that is the Balkans, this research study aims to contribute to the study of new forms of sociality in intentional community creation and the identity concerns they imply, particularly the interaction between "alternative" efforts and social activity. According to socio-political reality, autonomous community develop-

ment appears to be a tool for rethinking current social orders. However, the politically independent people are prone to political interest, and these initiatives, even through hardships, are one way for them to ensure their survival. In the region, due to the historical background, this is usually made possible mostly by foreign organizations and funding, namely European, European Union based, which tend to better understand the concept, as they usually operate in a setting where the relevance of ethnic/cultural identity in social relations has decreased in contrast to ideological identities and have usually a long history of statehood. Such has been the help the community has received from European organizations, including here from the EU delegation institution operating in North Macedonia.

Picture 8. Different communities and sister-organizations from Prishtina (Kosova), Sarajevo (Bosnia and Herzegovina), Brussels (Belgium) - (including the Space Tetova Community) - protesting the eviction notice of Space Tetova (some in front of the North Macedonia embassies in their respective countries).



On the other hand, the community declares that they have felt, considering everything that has happened, that not enough solidarity has been shown

from the local citizens, due to unclarity about the functioning of these kinds of initiatives (horizontal functioning and voluntary work traditions), and the masses tend to turn toward “conservative values influenced by Erdogan and ‘Besa’ (the party in power)” as its ideological proxy. This mix of religious political ideologies is not new in the Balkans; they are also present in Serbia, Greece, and, of course, Turkey; however, for the past decades they were absent, in part due to socialist regimes’ approach towards religion.

Clearly, there is a social conflict between the two parts, mostly over ideologies. Understanding the social and historical environment in which ideas and beliefs are developed and how these ideas might contribute to the continuation of social conflict is crucial, as the link between ideology and social conflict highlights. This conflict appears to have three distinct dimensions: generational, geo-political, and consequently cultural. The concept of conflict having multiple dimensions is a widely accepted idea in the field of conflict studies. One of the prominent theories related to social conflict is brought on by Hungarian sociologist Karl Mannheim (2013). In his book “Ideology and Utopia,” Mannheim discusses how the social location of individuals and groups affects their formation of ideologies and how these ideologies are used to legitimize social inequality and maintain power structures. According to him, social conflict is brought on by the diversity of ideas among the main societal groups, which are a result of social class disparities. Regarding the generational conflict, Mannheim states that people of different generations develop their own unique perspectives and worldviews based on the social, political, and cultural experiences of their formative years. He argues that these perspectives shape the way individuals perceive and engage with the world, leading to conflicts between generations. In this case, the generational gap between the mayor and the community is not as wide as he might think

when he uses the terms ‘youngsters’ as well as the ways he has interacted with them so far, perceiving their counterculture movement as ‘infantile’ or not serious enough.

The conflictual part in this case results more from differing values, beliefs, and experiences. This fact is linked with the geo-political dimension and refers to conflicts that arise between parties not only of different countries or regions but often of ‘competition’ over political power, or again, ideology. Considering the mayor’s party’s political context, which is oriented more towards a conservative and religious ideological identity, it clashes firmly with the community’s context of being aligned with ‘European’ and ‘western values’ of freedom, democracy, women’s empowerment, lgbtq friendliness, and other individual and group guaranteed liberties. The cultural dimension of the conflict is evident here, and it refers to the role that cultural differences and cultural identity play in shaping social conflict.

The subjective experience of the community (including my own) concerns the difficulty to express world culture in a tight and limited social space, considering the size of the city areas and population, which heavily affects culture as such. While the overall media attempts to show the existence and functioning of our community as well as the importance of these kinds of initiatives, reaching and encouraging young population to keep the hope for an expressive space within the city and the region has been significantly increasing due to the incidents – the media narrative has clearly differed in the inner city from the one that is created from subjects from other cities and foreign states that support and understand the importance of these concepts in the core.

While the story is continuously evolving as the community is now working towards the opening of a new space in a more independent way, continuing the fight about public spaces in the city and region, the inquiry remains regarding the work of the

ethnographer (me) and the relation between the subjectivity and objectivity of the ethnographer in applied anthropology (Singer, 1994).

In the course of conducting research, advocacy and political, material, and symbolic support can play a crucial role in community building and shaping public and media discourse. Supporting and promoting such a cause as an anthropologist through research, namely collaborative anthropology (Rappaport, 2008) and feminist ethnography (Westkott, 2019), can be a powerful tool for contributing to community building around a shared goal or belief while increasing public awareness for critical consciousness and social change.

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**GNUWA: SPIRITUAL SOUNDS OF HEALING
SLAVERY, RITUALS, MUSIC**

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Abstract

Morocco is known for its cultural and ethnic diversity. In this writing, I would like to shed light on a mystical ethnic group in Morocco that baffled many people from all over the globe; descendants of slaves who traced their origin to Sub-Saharan countries (Mali, Guinea, Ghana, Senegal, Niger). It also refers to a spiritual type of music that can be used as a method of healing with special rituals.

Keywords: Morocco, Gnawa, Slavery, Music, Rituals

Disziline: cultural anthropology

Absztrakt

GNUWA: A GYÓGYULÁS SPIRITUÁLIS ZENÉI. RABSZOLGASÁG, RITUÁLÉK, ZENE

Marokkó kulturális és etnikai sokszínűségéről ismert. Jelen tanulmányban egy misztikus marokkói etnikai csoportra szeretnénk rávilágítani, amely sok embert zavarba ejtett a világ minden tájáról, egy olyan népcsoport, akik a rabszolgák leszármazottai s származásukat a szubszaharai országokból (Mali, Guinea, Ghána, Szenegál, Niger) eredeztetik. Nevükhöz kapcsolódik az ún. Gnawa, amely egy spirituális zenei típus, amely speciális szertartásokkal gyógyító módszerként használható.

Kulcsszavak: Marokkó, Gnawa, Rabszolgaság, Zene, Rituálék

Diszciplína: kulturális antropológia

*The most important single element of Morocco's folk culture is its music
[. . .]. The entire history and mythology of the people is clothed in song.*
(Paul Bowles)

Origin of Gnawa

Identity cannot exist apart from a group, and symbols are themselves a part of culture, but ethnic identity and symbolic ethnicity require very different ethnic cultures and organizations than existed among earlier generations (Gans, 2010). The Gnawa are part of an ethnically and historically complex hybrid community that gradually emerged in the late nineteenth century with the slow disintegration of Moroccan slavery. Through travel, exchange, and negotiation, these former slaves merged aspects of various cultural influences from Sahelian and North Africa and, by the late nineteenth century, their identity crystallized and they started to market their culture (Becker, 2011).

In Morocco, the term Gnawa refers in general to all the ancient slaves of African origin. However, not all of them belong to the Gnawa brotherhood, neither their ethnic origin is a criteria to define their belonging to this brotherhood as the majority of the Gnaoui adepts are mongrel (of Arabic, Berber or African origins)(K'hal-Laayoun, 2019).

Etymologically speaking, according to Chouki El Hamel, 'Gnawa' refers particularly to physical colour, from which a good deal of insight into the origin of the Gnawa can be inferred. Historically, at least since the twelfth century, it means 'the black people'. It is important to note that not all blacks in Morocco were slaves who originated from West Africa. He also emphasized that Gnawa have over many generations, productively negotiated their forced presence in Morocco to create acceptance and group solidarity.

Unlike the conventional question in Black America 'Who are we?' Gnawa ask 'Who have we become?' Similar to the model of 'creolization' the

integration of freed black slaves into the French cultural landscape of the American state of Louisiana. Gnawa have created a model of their own creolization and integration into the Moroccan social landscape. This one of the most crucial and striking differences between blacks in America and blacks in Morocco (K'hal-Laayoun, 2019).

During the colonial period, many researchers and anthropologists tried to understand and classify this 'rather order' of Gnawa in the Maghreb countries. Among these researchers, J.B Andrews who conducted his studies at the beginning of the 19th century, thus, Gnawa have been identified since the turn of the 20th century as a religious popular brotherhood whose therapeutic practices would be the heritage of the Sub-Saharan animism rituals brought by generations of the slaves kept in the Maghreb. Thus Gnawa is traditionally defined as a religious group, a spiritual order, a ritual confrerie:

- A religious group integrated within Islam, acquiring from it its dogma without leaving any of their prints in this religion as ideas or tendencies.
- A spiritual order coexisting with other orders in Morocco as Aissawa (a religious confrerie, was founded in Meknes in Morocco by Sidi Mohamed Ben Aissa (1465-1526) and Hmadsha (the most important popular confreries in Morocco. Founded in the 17th century by the saint Sidi Ali Ben Hamdouch. This confrerie is well-known by its history and the originality of its rituals embodied in its repertory, its dances and the qualities of its trance-therapist members), and having reciprocal influences on each other.
- A ritual confrerie of Gnawa with their mystic beliefs and practices which mark their exclusiveness that incorporates references to their

African origin, their gloomy past of enslavement, and their aspiring hope for their salvation and identity (K'hal-Laayoun, 2019).

Rituals and beliefs

The beliefs and practices of the Gnawa religious brotherhood represent a fusion of Islamic and West African ideas. The Gnawa claim spiritual descent from Bilal al- Habashi, an Ethiopian who was the Prophet Mohammed's first muezzin; they also recognize and respect all Muslim saints. Most aspects of Gnawa ritual, however, clearly come from South of the Sahara, brought to Morocco over the past 500 years or more by merchants, mercenaries and slaves. The name Gnawa itself is said to be derived from Guinea. (Schuyler, 1981).

Most Gnawa ceremonies (derdeba) are held to placate spirits, good or evil, which have inhabited a person or place. The goal may be to purge a spirit that has brought illness, infertility, or other affliction, or to prolong a happy relationship with a spirit that has brought wealth, clairvoyance, or other blessing. Before the derdeba, musicians and devotees assemble outside the house where the ceremony is to take place. Large side drums (*tbel* or *qanqa*, a Hausa word) and metal double castanets (*garageb*) announce to neighbours and spirits alike that the derdeba is about to begin. Once inside the house, the musicians put down their drums in favour of the *ginbri*, a three-stringed lute with sliding leather tuning rings and metal sound modifier (Schuyler, 1981).

Gnawa rituals and beliefs centre on the *lila* or *derdba*, two names for an all night, trance-based, spirit possession ceremony. The event engages the senses to incite possession trance in paying clients, in some invited family or friends, and potentially in other spectators who are present. The types of possession beliefs and trance activities that feature in this ritual share many similarities with other African and syncretic practices (Witulski, 2018).

Allila of *derdba* is a nocturnal ceremony animated by a Gnawoi Maallem playing his *guendbri*, and accompanied by musicians-dancers playing their *qraqech*. It is a ceremony when some participants in state of trance, are supposed to be haunted or rather inhabited by supernatural entities called *Mlouk*. It is a kind of an initiatic trip consisting of a successive quest for spiritual states called 'el hal' permitting the dancers in trance to approach what is spiritual or divine (K'hal-Laayoun, 2019). In the *gnawa lila*, colourful cloths and incense correspond to each group of spirits, helping them gain full control of those who need healing. Most frequently, the healing is physical or emotional (Witulski, 2018).

Jinn

The term 'jinn' derives etymologically from the Arabic origin 'jenn' which expresses the idea of what is hidden from the looks and wrapped by darkness as the case of 'janin' the foetus hidden in the womb of the pregnant female (K'hal-Laayoun, 2019). She also added that Gnawa have always affirmed their belonging and faithfulness to Islam; and when the Koran refers to 'Al Inss' (human-kind) and 'Al Jinn' (supernatural entities) in its verses, the evocation of these spirits _ *jinn* _ by Gnawa is inscribed in this context. According to their version, their appeal to jinn helps them accomplish miraculous deeds in the 'Allilas' of *Derdba* such as making sick people recover their good health, barren women to have children, spinster girls to have husbands,...

According to Westermarck (1899), The jinn have no fixed forms, but may assume almost any shape they like. They appear now as men, and now as goats, cats, dogs, donkeys, tortoises, snakes, or other animals, now as monsters with the body of a man and the legs of a donkey, now in other shapes, sometimes, for instance, with seven heads. Westermarck added that Gnawa, who stand in an

especially intimate relation to the jnun, and who are frequently called on to expel them from people who are ill, are said to dress both themselves and the patient in the colour of the jinn that is believed to be the cause of the patient's illness, but this I have not seen for myself. All the seven colours of the rainbow are used for magical purposes when the tribes of all the days of the week are concerned, and, also, when, as sometimes happens, the particular tribe immediately concerned cannot be found out. The performance by means of which the Gnawa endeavour to expel the jnun is often very complicated, and may last for days. They sing and dance; walk round the patient and make wry faces close to him; take him on their necks and carry him about (Westermarck, 1899).

Tylor, in expressing the sense of the meeting as to Westermarck's study of the jinn in Morocco, remarked that the first sentence of the paper showed the line along which he had approached the problem. The late Robertson Smith, by his work on the Religion of the Semites, vastly improved the method and enlarged the horizon, of current theology by the introduction of anthropological evidence. But through the influence of his friend J. F. McLennan's Primitive marriage, he was led to introduce too confidently the doctrine of totemism as a leading factor on the religious side of ancient society, and he put forward the idea that the Arab beliefs as to the jinn were evidence of an early stage of totemism among, the Semitic race. This view appearing to Westermarck questionable, he collected during his residence and travel in North Africa the particulars as to the beliefs as to the jinn prevailing there, which are generalised in his paper read to-night. (Westermarck, 1899).

When Westermarck resumes his inquiries in North Africa, he may be able more or less to clear up the interesting (question which he has doubtless had often before him, how to distinguish and delimit the two ways in which men or demons can appear and behave as beasts. Is transformation of

jinn into cats or tortoises or snakes something, related transmigration of souls, or is it considered to take place by quite a different process?

Gnawa brotherhood

There are other significant differences between Gnawa practice and Sufism. For the Gnawa, the spirit world is inhabited by ancestral spirits who, among other spiritual creatures, can be used for either good or evil purposes. Ancestors are believed to act as intermediaries between the living and the supreme God, and the Gnawa communicate with their ancestors through prayer and sacrifice. The spirit world is also invoked through special ceremonies, in which drumming, clapping, the sound of the castanets and dances were designed to enlist the aid of ancestral saints (El Hamel, 2008).

The Gnawa have created for themselves an imagined ancestral link to Bilal, a link that constitutes a piece of the patchwork of their identity despite not being historically feasible. According to the Gnawa, Bilal danced and sang to cheer the sorrowful Fatima, favourite daughter of the Prophet Muhammed. As a reward, Muhammed offered Fatima in marriage to Bilal who declined on the grounds that a lowly slave did not deserve to marry the Prophet's daughter. Since Bilal was of "black" African descent, this story reinforces the Gnawa claim to baraka and to a special status within Islam, even while it confirms their slave status (Becker, 2011).

From slaves to stars

In Morocco, Gnawa music is found mainly where black people live in a relatively large number; large enough to form a distinctive community like the ones in Marrakech and Essaouira. These two cities are known historically to have had slave markets connected to the trans-Saharan slave trade. Therefore, in these two towns, Gnawa are proximate by their history, culture, and geographical

situation (K'hal-Laayoun, 2019). From oppression was born their art, from cruelty arose their songs, these Gnawa, in majority slaves by origin, have saved their identity via their rite, art, and music. And this music remains vital to create a dialogue of tolerance and coexistence between culture and civilizations, and to generate a magical atmosphere where the festival of Essaouira has found its soul (K'hal-Laayoun, 2019).

Essaouira is a wind-swept resort town toward the southern end of Morocco's Atlantic coast, three hours west of Marrakech. The town is remarkable for its annual festival celebrating the music the Gnawa, a heterodox group of religious lodges whose members claim descent from formerly enslaved sub-Saharan Africans. Indeed, the town played a major role in the trans-Saharan slave trade and also has a significant Jewish history. Moreover, Gnawa music continued to grow and develop as a genre and form over the twentieth century from its ancient roots in spirit possession and trance rituals to increasing levels of commercial production for domestic and international consumption (Shaefer, 2017).

It is a typical trance music used by members of the Sufi brotherhood to attain mystical ecstasy. Members of the group, who claim descent from Sidi Bilal, the exslave from Ethiopia who became a highly respected caller to prayers (muezzin), include master musicians, drummers, intriguing-looking women, mediums, and others who a long time ago established their home in Marrakech and other southern regions. The West African slaves who arrived in North Africa in the sixteenth century brought this genre to Morocco; consequently, the lyrics have components of Senegalese, Guinean, and Malian traditions.

A lute (qsbah) with a long neck of African origin called the gimbri, double-iron cymbals (qaraqab), and a double-headed cylindrical drum (tbel or ganga) played with curved sticks are common instruments of the Gnawa music (Njoku, 2006).

Shaefer questioning what contributed to its success? Following is an examination of reasons for the success of the Gnawa festival and an argument that a large part of this success is due to the way the festival enables the "festive sacred," the transnational capitalization of the sacred (Kapchan, 2008). The festival does this so well because the musicians at Essaouira productively combine participatory with presentational performance practices (Turino, 2008)

Shaefer (2017) added that folk musics are typically cast as participatory and elite musics as presentational but the goal in a festival like this one is to have enough participation to engage tourists and enough presentation to give them a show. With its great potential for participatory discrepancies (Keil 1994, 1995), Gnawa music is nearly perfectly positioned for such creative recombination.

For Victor Turner (1982), festivals were the "high tides" experiences" in a community. Festivals could be interpreted the members of the community, and they could do things community as well. Roger Abrahams, in particular (1982), attention to the kinds of things festivals do, which vary to the needs of the community in question - agricultural, industrial (Shaefer, 2017).

According to Christopher Witulski (2018) three interrelated but distinct narratives of gnawa authenticity are in play throughout the ritual community and music industry. They each draw upon the forms of authenticity described by Bigenho (2002), especially because they bring powerful authentic experiences together with forms of authority derived from music or musician's positionality within a cultural context or historical trajectory. These types inform an individual's perception of authenticity (Weiss, 2014). Traditionally or originally, the Gnawa music among the different branches inside the Gnawa confrerie has been much linked to rituals. It has been played in the streets, districts and at the time of ceremonies. Music has been useful for healing, protecting and

chasing the malefic spirits. Born from slavery, the Gnawa music, by echoing either the African or Arabic or Berber songs, is carrying a message in its purity to attract the audience into a smooth intimacy. And the more and more this music is implemented by Western tones and sounds, the wider this audience becomes (K'hal-Laayoun, 2019).

The Gnawa community is rapidly changing. While older masters in their sixties, seventies, and eighties pass away, their music captures the imagination of new generations. Some join the groups of older performers, helping out in any way they can. They take lessons, like a violin student might, while others sit alongside ensembles during rituals, beating out the rhythmic patterns on their knees and mouthing the words to the songs (Witulski, 2018).

Gnawa always tell their sufferings through their songs, a petition to god and saints to help them. According to Master Gania, the oldest Gnawa song is the Mbara song. This historical slave song goes:

Oh! God our lord,
My uncle Mbara is a miserable man
What a fate does he have?
My uncle Mbara is a poor man
Our lady eats meat
Our master eats meat
My uncle Mbara gnaws at the bone
Our lady wears elegant shoes
Our master wears beautiful shoes
My uncle Mbara wears sandals
Oh! God is our guide
This is the predicament of the deprived
Oh poor uncle Mbara. (El Hamel, Chouki, 2008)
Song 'Imploration'
Allah Allah Yallah
Hna fhmayt Allah
O' God Almighty
We are in God's mercy

Allah Allah Yallah
O'Mohamed Rassoul Allah
Our Lord's messenger
By his will our ressecuer

Allah Allah Yallah
Our redemption by Allah
Orassoullah shfaâa ya Rabbi
In Eden we will inchaalah be

Allah Allah Yallah
For the behalf of Allah
Sidna Bilal called
For prayers to God

Allah Allah Yallah
For the love of Allah
We mediate, smile or cry
In trance we cheer or soliloquy

Allah Allah Yallah
Finkom ya rijal Allah
Inss and Jinn all pray
For God's blessing as destiny.
(K'hal-Laayoun, 2019)

Conclusion

A number of scholars have turned their critical lens to examining slavery in and out of Africa. Scholars like Colin Palmer, Michael Gomez, Paul Lovejoy, Eve Troutt Powell, Deborah Kapchan, Patrick Manning, Tim Cleaveland, Cynthia Becker and Bouazza Benachir have given us fresh perspectives that emphasize a different starting point of analysis: they call attention to the agency and influence of marginalized groups on the greater social whole. Their analyses of marginalized groups bring out the complex dynamism of integration and the diaspora (El Hamel, 2008).

Various studies conducted by many researchers about this mystical ethnic group concerning the rituals, the music, the art and culture but the threatening acculturation motivates the scholars to investigate the process of sociocultural change.

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**INEXPLICABLE BEINGS, PHENOMENA, AND EVENTS, CATEGORIZED AS
MYTHOLOGICAL, AMONG THE PEOPLES OF THE SOUTH SLAVS:
COLLECTIONS OF FOLK TALES, INTERVIEWS WITH STORYTELLERS AND
MYTHOLOGICAL BEINGS IN MODERN NOVELS**

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Abstract

This article contains the basic structural features of a same-named Ph.D. research thesis. The main tasks of the research are to identify three focal fields with mythological elements, whether they are phenomena, objects, people, or creatures that some believe and others doubt exist. These focal fields are found in various collections of folk stories, and contemporary literary texts as well as in interviews with storytellers. However, the focus of this article is primarily on the introductory story and on providing the background of the general idea. The goal is to acquaint the readers with the background that explains the origin of the mentioned stories among the people. It talks about death, man's natural fear of it, and the world of the paranormal, religious, and mythological, which combined create inexplicable phenomena that contradict the rational reasoning of man. One of the hypotheses of the research itself is to understand why this phenomenon is still present in the human community and what benefits it brings. Furthermore, the methodology used in the research includes a comparison and contrast of information between folk stories and contemporary literary works. In addition, the most important research method used is the interview technique with the aforementioned storytellers with strategically selected persons who are assumed to possess quality information.

Keywords: myth, folk tales, mythological beings, supernatural events, paranormal, storytellers, Slavic mythology

Discipline: cultural anthropology

Absztrakt

MITOLÓGIAI KATEGÓRIÁJÚ MEGMAGYARÁZHATATLAN LÉNYEK, JELENSÉGEK ÉS ESEMÉNYEK A DÉLSZLÁV NÉPEK KÖRÉBEN: NÉPMESEGYŰJTEMÉNYEK, INTERJÚK MESEMENDÓKKAL ÉS MITOLÓGIAI LÉNYEKKEL A MODERN REGÉNYEKBEN.

Jelen tanulmány a szerző azonos című doktori értekezésének alapvető szerkezeti jellemzőit tartalmazza. A kutatás fő feladatai közé tartozik három olyan mitológiai elemeket tartalmazó fókuszterület – a jelenségek, tárgyak, emberek vagy lények – azonosítása, amelyek létezésében egyesek hisznek, mások pedig kételkednek. Ezeket a fókuszmezőket különböző népmeseegyűjteményekben és kortárs irodalmi szövegekben, valamint a mesemondókkal készített interjúkban találjuk meg. A tanulmány középpontjában elsősorban a bevezető történetek és az általános elképzelések hátterének bemutatása áll. A cél az, hogy az olvasók megismerjék azt a hátteret, amely az említett történetek népi eredetét magyarázza. Szó esik a halálról, az ember haláltól való természetes félelméről, valamint arról a paranormális, vallási és mitológiai világról, amelyek együttesen olyan megmagyarázhatatlan jelenségeket hoznak létre, amelyek ellentmondanak az ember racionális érvelésének. A kutatás egyik hipotézise, annak megértésére fókuszál, hogy miért van még mindig jelen ez a jelenség az emberi közösségben, és milyen előnyökkel járhat mindez az egyének számára. Továbbá a kutatásban alkalmazott módszertan magában foglalja a népmesék és a kortárs irodalmi művek közötti információk összehasonlítását és szembeállítását is. Ezenkívül a legfontosabb alkalmazott kutatási módszer az interjútechnika olyan mesemondókkal, stratégiailag kiválasztott személyekkel, akikről feltételezhető, hogy minőségi információkkal rendelkeznek a témában.

Kulcsszavak: mítosz, mitológiai lények, természetfeletti események, paranormális jelenségek, mesemondók, szláv mitológia

Diszciplína: kulturális antropológia

The Border of Life and Death

In every family in the South-Eastern Balkans, one saying is kept being told to the young members of a family: “There is a solution for everything except death”. Seems morbid but if you ask an average, concerned mother/father with years of life experience and wisdom - not really. On the contrary, it is instructive and realistic, and the sooner one understands it the easier it will be to go through life, for people needlessly burden themselves with things for which there is always a solution. This is all said in order to receive a better impression of how heavy, difficult, and undeniable fact death is. Whichever way a man turns, whatever he does, however he lives his life, he moves rectilinearly towards it. This should not be taken

literally in a straight line, because a man’s life path seems to be everything but straightforward, but in essence, the path is the same, at least in abstraction. Unless completely uninterested in believing in ‘some God out there’ or a ‘force’ then the average person, one would say, wants only one thing: not to meet the eternal darkness afterlife. In other words, one hopes there is life after death.

Now, the line is drawn at the very end. What is there to be done until that end? People live their lives in the way they know best, in the place they know best, with the customs they know best, and the pattern they know most surely. Let that border be named: *the border of life and death* and in a literal sense, not in a metaphysical one. On the other hand, there are always those who prove in various

ways that they know what happens after, along with the absolute non-believers who 'know' that there is nothing after death. Christians and Muslims, on this question, are prepared to give answers in two forms:

First, 'no one knows', because no one has ever returned after death except, in the Christian world, the Lord Jesus Christ and those he himself resurrected (here, for obvious reasons, the Islamic religion is excluded), but in essence, in the modern age, no one has. In another form, the answer says that heaven or hell awaits after death based on deeds in life. In the meantime, humans need to believe, hence the word faith. Therefore, most massive assumptions and beliefs were made about what awaits after the end, and in the meantime, life is there to be lived.

The Village as a Portal for the Paranormality

When talking about life, the narrative has to be moved to a period, not so far from today's, the twentieth century (just as an example), the fifties, the village of Ljevišta, Gornja Morača. This is the northern part of Montenegro (the village Ljevista is situated in the region of Gornja Moraca (Upper Moraca in English) ranging from Mioska to Savnik municipality. The other part of the Moraca region is the 'Donja Moraca' or the Lower Moraca. This is the northern part of Montenegro). This is taken as an example because it is that exact village that makes a segment of a larger field work where the interviews with storytellers will be conducted. Some of the most fantastic stories come from two people who lived a part of their life there.

In the majority of active and formerly active villages in the Balkans, there are, or were, four segments that are inseparable from each other: work in the fields and with livestock (from which one lives), family life (what life is made of), social life, and the religion and belief segment. This last segment, of the most interest and it touches upon

all the remaining mentioned segments and exerts an influence on them. The actual story about death and life shows how important, terrifying, and unfathomable the phenomenon of death is for a human. There awaits the question of the location of the connection between the village and that phenomenon. What is the meaning of that connection? What is hidden in it and what are the consequences of it? This will be answered later and everything will be clearer.

Ljevista, like most Montenegrin villages, is the territory of one of the seven tribes situated in the Moraca region with Rovci and Kolasin municipality. In his book „*Origin and Development of the Hill, Montenegrin, and Herzegovina Tribes*” (author's translation. Of the book's original title in Serbian: „*Postanak i Razvitak Brdskih, Crnogorskih i Hercegovackih Plemena*”), Branislav Djurdjev records that the people who lived there are also called Bogicevici, the heirs to Bogic Moracanin.

The people have a habit of saying that every village is the same as the next one but also has a separate culture in itself. If earlier history was heroic, written in blood and battles with the Turks and other invaders, the one mentioned is similar even in periods of peace. In the unfilled space there was only village life and care for families, animals, and crops, which in such harsh regions of the untouched nature, meant 'life and death'. Until recently, before advanced technology, people often filled their free time with dances, card games, and of course, what is most interesting, telling stories late into the night. It was then when they would talk about everything that a person would absorb with their eyes during their working day, hear, and hide within themselves.

Then one could hear stories about everything mentioned, but also sometimes about what the man himself experienced on his own skin, which stood out from the normal. At the heart of the folklore of every village was or is the theme of inexplicable events, strange events, and incredible

combinations of circumstances. The mentioned have as a foundation the folk belief in the existence of certain beings (that do not belong to this world), phenomena, and all of them would be in some way connected to religion, that is, closeness to or deviation from God and God-pleasing life. These include, if rules strictly related to Christianity are excluded, various customs ‘what should or should not be done on certain days’, what is allowed and what is not allowed to be done, ‘where one should go’ and where no one sets foot because of ‘this or that reason’ etc.

One thing should be clear: Everything mentioned is an important part of a village, but what became clear in the conversation with the people who spent most of their lives there is that no one, no matter how contradictory it sounds, added significant importance to it. In most cases, if something happened that would later become a dark part of village folklore, such as the appearance of the famous creature fairy, they would record it in their mind and the collective consciousness, but never act upon it directly because of either superstition (fear: mentioning its name might summon it) or because of natural avoidance of what makes one afraid.

Regarding fairies, Petrovic classifies this creature as „a mythological female being who lives and clicks on the rocky mountains, endowed with magical power (heals and tells fortune)” (Petrovic, 2000, 122.) (Author's translation. Of the quote from a book in Serbian: „mitologično žensko biće koje živi i klikće po plainama kamenjacima, snabdeveno magičnom moći(leći i proriče)”. In addition “fairies are forever young and wear a long and thin white or blue dress, which hides the goat legs of some fairies. Some fairies also have wings, and with their wonderful voice, they lure those young men into their dance circles. The eyes of fairies shine like lightning“ (Vasiljev, 1928, 50). (Author's

translation. Of the quote from a book in Serbian: „S druge, takodje, „vile su večito mlade i imaju stalo na sebi dugu i tanku belu ili plavu haljinu, koja krije kožje noge ponekim vilama. Neke vile imaju i krila, svojim divnim glasom, primamljuju one mladiće u svoja kola. Oči vila sevaju kao munje“). Vasiljev also talks about fairies as creatures that can be good and helpful to humans, but also evil in the event that they are harmed or if someone caused damage to their living space.

The story about the border of life and death places itself in the middle of the village of Ljevišta. That border can be imagined as a line that divides life and death and between the two there is a territory that neither the dead nor the living understand. Neither should belong there, nor be ‘seen’ by one or the other. The ideas are that in that space exists a world full of inexplicable beings, phenomena, and everything that human science calls mythology. Some Ljevišta residents would describe that area as ‘he got drunk and saw fairies’, but whether someone got intoxicated or a real fairy added a bottle of rakija. This world of different dimensions, spiritual and material, overlap in that border, and therefore some people, not all, for unknown reasons, can see, hear, and experience what should not exist in the world of the material and rational. Not all of them have the experience and that is why such events are special.

However, they are not devoid of coincidences, appearances, the ‘you must be imagining things’ phenomenon, as well as the well-known villagers’ practical jokes. In support of this story is the belief that villages or specific villages are really ‘knots’ of certain forces, where people say, strange events take place, ghosts appear, or even inexplicably cars stop working. Such was the case when A.S. Ignjatovic (2014) describes his encounter with the inexplicable force which made his car shut down at midnight, on the bridge leading towards a small place called Bistrica.

The Role of the Human ‘Hero’ in the Inexplicable

*Here we have our present age...
bent on the extermination of myth.
Man today, stripped of myth, stands famished
among all his pasts and must dig frantically for roots,
be it among the most remote antiquities“*
(Nietzsche, 1993, 110).
The Birth of Tragedy from the Spirit of Music

Folklore, stories, retellings, collections of folk stories, and modern literary adaptations have their roots in the supernatural and inexplicable. Something that happened, whether it was real or not, an event that a certain person experienced goes against the normal and explainable. It can be an event, an incomprehensible apparition, a sound, or a person who, according to all the laws of reason and rationality, time and space, should not or could not be in front of the eyes of the hero of the story. An inexplicable event that defies logic and rationality could be a creature that looks neither human nor animalistic or is one or the other. It possesses inhuman/supernatural powers or/and human/animal attributes. In these stories, for the purpose of the example, it is often a fairy, a demon, a devil in disguise, a vampire, or even a *karakondzula*.

Figure 1. “The Story Vampire life”, Ivica Stefanović, 2011



Karakondzula creature is an interesting one because it can be accepted as a female version of a vampire. It is important to record it because it is one of the most mentioned ones. This creature is an embodiment of a once-living human, a Christian soul, a woman, very often a bride ‘jilted at the altar’, an animal, a demon, and many other things. It is usually a physical manifestation of a formerly young woman but in a form of an ugly, old woman in the afterlife. From the various stories, it is understood that it is an old witch, a woman who was supposed to be a bride in the world of living and now she chases mostly men and terrorizes them.

It is exactly here that the visible importance of this creature shows itself. The fear does not start when one meets a gorgeous young woman in the woods. It does not even start when a person realizes she is not of this living world or when she starts chasing them through the woods.

The fear strikes when she, according to the village people, shows her young and beautiful body, but with a head of an old witch, flashing her animal fangs. However, the descriptions are different, therefore in “The Serbian Mythological Dictionary”, for example, this creature is described as having light-colored eyes and walking around with a huge cane with which she chases children.

It is especially present during the time of the unbaptized days when she could be seen sitting above the entrance of somebody’s house, waiting to hop on the person’s back as he comes out. Karakondzula rides on a person’s back and makes him run usually towards a stream or a river until either the rooster starts to sing, that is, until dawn, or in the rare case, she is thrown off. (Kulišić, 1970).

Furthermore in the “Serbian Mythological Dictionary”, the ‘unbaptized days’ or in Serbian “*nekršteni dan*” are those between the Orthodox Christmas (which falls on January 7th) and Epiphany or ‘Theophany’ and according to the folk

belief, the demons and the deceased, unbaptized children appear during this time.

Coming back to the role of the hero of the story who is at the same time the subject but often also the object of the phenomenon, the hero can be:

- A silent observer who may or may not be noticed, who returns home safely, unharmed.
- An active participant in a supernatural event who may emerge alive and unharmed but will more often end up either dead or permanently mentally and/or physically crippled.

According to the template, the hero of a supernatural event, if he (assuming it is a he) belongs to the first group, he either does not believe in what happened to him, after which he finally believes, helped with afterthought and counseling, or he believes and immediately adopts the "lesson". If the hero belongs to the second group, considering that he survived the encounter with the supernatural, he suffers from the consequences of the encounter in the form of mental or physical disturbances (often both). The person is the only one who knows the truth, and people either do not believe him (often justifying the event with alcoholism) or believe him, and they draw a lesson from that - opinions are divided. In the event that, is often is the case, he turns up deceased, considering there are witnesses (which is not a rare case), it serves as an example for learning lessons from encounters with the supernatural. If there are no witnesses, he is labeled as a victim of an accident or self-harm event.

In the end, stories like this about events that may or may not have really happened have their own function among the people.

It is exactly this function that leads folk to pass them on from generation to generation, to write them down, publish them, print, and adapt them even into movies.

The Three Key Fields and Tasks and the Definition of the Mythological

Going back to the grander scheme of things, the whole research, it is important to present the three key tasks that have been formulated in the terms of three fields of interest. The first field is presented in form of collections of folk stories that were collected by famous Serbian (Balkan) writers, and versatile and talented historians such as one of the greatest: Vuk Karadžić. His collections were formed by going from village to village, from place to place, from door to door listening to and writing down folk tales, stories, extraordinary experiences, songs, proverbs, and more. The focus stands on the folk tales, and all the exceptional examples of mythological creatures and the phenomena that accompany them are singled out. In addition, there are things that cannot be categorized as mythological, but as absolutely unfathomable, sinister, and extraterrestrial. Furthermore, all the accompanying 'hexes and spells', 'witchcraft', 'curses', and, sub-religious processes are included, for they are certainly inseparable from the mentioned beings.

In the second field, which is conceived as a set of literary works of recent times, identical to the previously mentioned objects and subjects are being identified. As an additional idea, analyzing film adaptations of a mythological background proves to be an abundant source of information. The third field takes the form of interviews, that is, conversations with storytellers. Those story-tellers are selected people who must, first of all, fulfill at least one and the most important condition.

The condition is that he or she must have a personal 'paranormal experience' (which is valued the most) or personally know someone who had an experience with a supernatural event, that is, an event that defies the natural laws of this world of matter, rationality, and reason. Therefore, something extraordinary happened to a single person and now, either in the complete conviction

of the truth of the event or in continued disbelief, they recount their experience. Furthermore, those persons, ideally, come from or still live in places (villages) where such events take place. They know someone to whom something "out of this world" has happened. In those retold stories, a structure is built where the essential, key elements are singled out, and they match those found in the collections of folk stories, also in the aforementioned contemporary literary works. It is very important to clarify the situation with the 'mythological' aspect of the whole work. A myth is "a story of the gods, a religious account of the beginning of the world, the creation (...) the reenactment of a creative event (...) transferred to the present and its result (...) can be achieved once more here and now. In this way, too, the world order, which was created in the primeval era and which is reflected in myths, preserves its value as an exemplar and model for the people of today." (Honko, 1970, 38.). It is a wondrous world of gods, demigods, fantastic creatures, and their outward abilities, told, painted, and created by those who are the opposite of the people. The eternal desire of a man is reflected precisely in the mythological construction that stands seemingly in front of us. „A myth is a way of making sense in a senseless world. Myths are the narrative patterns that give significance” (May, 1991, 15). It fascinates with its grandiosity, but when one puts his hand through it, he realizes that it is only a hologram of his imagination and eternal desire for divine supremacy. The mythological basis here is, of course, the Old Slavic mythology, which is complex and rich, but it really only started to be researched in the 18th century and can only be reconstructed from parts that are found in folk tales, fables, epics, songs, etc.

Slavic Mythology and the Complex Fusion of Paganism and Christianity

In essence, the complex world of Slavic myths can be concentrated on the basic myth that

consists of the struggle between good and evil in a metaphorical sense, with heaven and the underworld as the domain of the protagonist and antagonistic deities, heaven, earth, and the underworld in cases where the human races become integral. One often comes across a combination in which the plane of evil and good is divided between the god of rain, thunder, and lightning Perun, who rules the sky (positive element), and Veles - the god of the earth, that is, the underground (element of evil). As the focus here is mostly on the southern Slavs, it is known that there were various differentiations regarding the form, properties, abilities, and names of the deities as the Slavs migrated from the prehistoric Slavic territory. All of them, however, have a common root and belief, therefore, taking for example Perun and Veles, as well as many others, are often found under a similar name.

Kaisarov (1810) begins the history of the Slavic polytheistic world by pointing out that a Slavic man, at least in the beginning, did not worship as many gods as was the case at the end. In the period when man did not yet know art, deities were objects for him, as representatives of nature. All nature, earth, mountains, hills, water, and air were only objects of his admiration, Kaisarov thought, and at that stage of human development, there was no idea the mentioned elements could control a man. From the moment when that thought appeared, there was an assumption about the power possessed by those elements of nature, and therefore, first appreciation, respect, worship, and finally deification ensued.

When thinking about the cause of the appearance of deities, that is, polytheism in early humans, the mind immediately flies to the thought that man is essentially a 'weak' being who, knowing his weakness and vulnerability (and he is strong and brave up to a certain limit), seeks the ultimate protection in the form of a higher power. In addition, there is a natural curiosity and desire of a

man to explain what is happening to him and around him. Therefore, the creation of Gods moves rational consciousness and logical reasoning far into the future. And so Kaisarov continues in "Slovenian and Russian Mythology" (1810) that in the beginning man had no idea about good and evil, not at least about its manifestations. Therefore, when he went hunting and came back empty-handed and in pain from exertion, he would not blame the obvious, logical reasons for his pain, but the existence of „something evil” that want to cause him harm. With the same pattern of cognition, man also discovered ‘something good’ when he felt the joy of a good hunt, then he would attribute that success to a new divine creation that he himself unconsciously is the creator of.

This is how early man got the first two deities: "Bjelbog" and "Cernobog" with clear associations of good and evil. Furthermore, the template for the emergence of new deities are clear, and the eventual merging and ‘evolvment’ into the Christian differentiation of good and evil, God and Satan.

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In a way it can be said that a mythological assimilated with the Christian world of God and godly creatures, i.e. angels, saints and the like, as well as with the world of demonic creatures. With that one naturally arrives to the church’s war with the paganism once Christianity set its foot on the stage. People lived with spiritually settled lives before, for centuries even, along with their beliefs which their life consisted off. Therefore, just as today’s mainly monotheistic religions, the people were not ready to give up that lifestyle that easily.

The church knew this and it “sought to know paganism primarily in order to successfully criticize it, to expose its manifestations, in order to combat manifestations of dual faith. For these purposes, church authors, presenting their teachings, they singled out in paganism mainly those features in which it differed from Christianity: polytheism, idolatry, bloody sacrifices, the slaughter of people.” (Klein, 2004, 13.) (Author's translation. The original text in Russian: „*Prostoj narod, derzhas' stariny, pomnil o nih dol'she, no i jeta pamjat' slabela so vremenem. Sobranilis' obryvki znanij, ostatki, perezhitki. Srednevekovaja uchenost' obsluzhivala hristianskiju cerkov' i stremilas' znat' jazychestvo prezhdje vsego radi togo, chtoby ego uspesjno kritikovat', razoblachat' ego projavlenija, radi bor'by s projavlenijami dvoeverija.*

V jetih celjah cerkovnye avtory, sostavljaja svoi pouczenija, vydeljali v jazychestve glavnym obrazom te cherty, kotorymi ono otlichalos' ot hristianstva:

mnogobozhie, idolopoklonnichestvo, krovanye zbertvy, zaklanie ljudej. Jeti otlichija userdno preuvelichivalis.”).

However, where the ‘combat’ with paganism did not work, the clergy simply put on a different label on deities and found common ground. The consequences of this are visible in, for example, the villages, where the customs that are the result of the mixing of Old Slavic deities with Christianity have persisted and even spread among the urban population, for the purpose of better acceptance of the new monotheistic religion among the people. Thus, for example, in Orthodox Christian communities, a debate is often opened as to whether some religious custom, minor or grander is really related to pure Christianity, or if it is just a legacy of the earlier period of paganism which strayed away from The Book. St. Elijah as an example is the perfect case of this.

The Example of St. Elijah

Saint Elijah was an Israeli prophet who lived in the ninth century BC. His name and personality, among others, are recognized as legitimate and significant in Judaism and Islam, given that Elijah’s name is mentioned in all three holy books for each of the mentioned religions. Taken from chronicles of the Serbian Orthodox Church, and having an insight into the information from the King James’ Bible, St. Elijah was a miracle worker and a true witness of God’s faith, born in Tesvita from the tribe of Aaron. From the moment he was born, strange supernatural phenomena and beings that circled around him in the form of angels and fire were present, and according to the writings, it is said that this is precisely what originated his "thunderous" and "fiery" character. (Eparhija Zahumsko-Hercegovacka, 2021). With his great spiritual commitment, sacrifice, and fight against idolatry in the Jewish kingdom, he proved himself before the Creator, fighting most of all against Ahab, the King of Israel. (Eparhija Zahumsko-

Hercegovacka 2021). At the end of his spiritual and God-pleasing asceticism, St. Elijah would finally be taken up to heaven“ as (...) suddenly a chariot of fire and horses of fire appeared and separated the two of them, and Elijah went up to heaven in a whirlwind” (The King James Bible, 1611/2001, 2 Kings 2:11).

The last description also confirms the "thunderous" and "fiery" element of his persona, which will also be important for comparisons later.

At this point an introduction to St. Elijah within the Serbian community is essential. Among the Serbs, he is known in the church as *Elijah the Prophet*, but also as *Elijah the Thunderer* (In Serbian: „*Ilija Prorok*” and “*Ilija Gromovnik*”), and under this name, he is mostly associated with the folk belief and the people’s way of accepting this Christian saint.

St. Elijah occupies a special place, especially among saints who have a thunderous character both literally and figuratively. These are generally characterized, looking through the framework of Christianity, as deserving holiness received from God. However, some of them are "gentle" and some harshly punish humans for sinful acts with the power they received, again, from the Lord God. Bearing in mind that the assimilation of Christianity with the already present earlier beliefs of the people was somewhat difficult, there was an inevitable ‘fusion of deities’ where the Christian St. Elijah got something from the character of the earlier 'pagan Elijah', i.e. the god Perun.

Of course, a somewhat more logical alternative is to match the description from the Bible with popular descriptions of earlier deities. In any case, among the people, St. Elijah is represented on fiery horses with thunder rumbling behind them, while he rides in the sky through the clouds. This is exactly what is depicted in Orthodox icons. In some of them, where his persona is Elijah the Prophet, the saint often sits on a rock or in a cave while a raven brings him food. In other versions of

this saint, under the persona of Elijah the Thunderer, he is depicted riding on fiery chariots pulled by winged horses, followed by angels. Both of these personas are legitimized by the Serbian Orthodox Church and deemed inseparable.

The breaking point of the discourse which splits the field and creates a debate is the following question: Is St. Elijah, the Christian saint known to the Serbs as "Ilija Gromovnik" (Ilijah the Thunderer) in fact in people's subconscious the God Perun who controlled thunder and lightning? From the anthropological angle it does not really matter. What matters is the richness of culture and folk belief for the goal is not to prove the existence

but to show from the present everything that was and still is and why it is there.

Example Forms of Manifestations and the Three Key Tasks

In any case, it is not that one gets to actually meet the great examples of deities in the stories from collections and interviews. The case speaks about the manifestations of their power and energy fields, so to speak. However, one can, for example, encounter the greatest anti-hero that exists in all religions of the world, "The Devil", which exists in different forms and under different names everywhere.

Figure 2. St.Elijah, Unknown Serbian Iconographer, 18c.



Figure 3. Elijah The Prophet, Serbian Orthodox Church - Eparhija Šumadijska, 2014



However, in the Balkans, he often shows himself to the average seventy-year-old old man from the village when it gets dark, in the forest, when "the roosters are sleeping". In the past, among the village people all across the Balkans, at least in Serbia and Montenegro, the general advice was not to go out of the house before sunrise, that is, when the rooster starts singing, announcing the new day. People believed that everything 'unholy' and 'ungodly' roams the woods and roads at that time.

This is exactly the phenomenon that in some cultures might be called "the witching hour" or "The Devil's Hour" in relation to Christianity. "The witching hour" is a term which relates, supposedly, to the time of the night when the dark forces of the unknown, the devil, the ghosts of the demons, and other demonic creatures are the strongest and have the highest power. The general first mention of such a term or anything related to the witches surely rose from as early as the 16th century, considering the frequent witches' trials. However, it is interesting to note the mention of the phrase witching hour in one of the stanzas of the poem called "Night, an Ode" by Matthew West.

„And see, bright Cynthia from th' ethereal Steep
On ev'ry Mountain sheds a solemn gleam!
Her trembling Glories paint the wat'ry Deep,
And add new lustre to the silver Stream,
Along whose banks at Midnight's witching hour
(So way-ward fancy dreams) aërial Beings pour!”
(West, 1775, para. 4)

It is in the fourth stanza of his poem that he seemingly gently paints the nightly scenery. The author even mentions "Cynthia", which comes "from a Greek *Kynthia*, an epithet applied to the goddess Artemis (...) born on Mount *Kynthos* on the island of Delos" (Hanks et al., 2006, 66.), who is a "Greek goddess of the Moon and of hunting, equivalent to the Latin Diana." (Hanks et al., 2006, 21.). The setting in the poem is idyllic and one

might not even notice the witching part if one does not look for it. Now, that is also a part of the actual reason, according to the stories of the people, why people find themselves in the paranormal. What puts them in trouble is their curiosity which makes them look for something which does not want to be seen. On the other side, this setting suits the witching hour in which the before-mentioned fairies might be dwelling about since they are the demonic creatures described as fair, usually beautiful but deceitful and sinister. Considering that, Balkan villages' witching hours could be merged with the Western ones.

Thus, anyone who is involved in any kind of satanic, 'witch' process, magic, spell, etc. can have the best result exactly at this time of the day, that is, during the night time. Whether it was an alleged spell-making or casting a curse, or hurting an unsuspecting person, this is the time to do it and to have the best success. Regarding the exact time, as for the Balkans, considering the fact that up to the 19th century people rarely possessed clocks, not a considerable amount of care was put out towards the exact timing. The order was: 'do not go out' and that was enough. As for the other regions, more likely Western countries, this was considered to be somewhere between 3:00 am and 4:00 am, but the time varies from country to country.

Regarding the other phrase "The Devil's hour", the meaning is more or less the same but rather with a closer focus on the Devil itself, since, it is in the end, his hour. The belief among some in the Christian community was and is that the timestamp hour of the supposed time of death of Jesus Christ. However, the exact time as well the year is debatable, however, the timing is narrowed down to probable 3:00 pm. In the gospels of Mark and Luke, it is almost identically stated as such: "And when the sixth hour came, there was darkness over the whole land until the ninth hour. And at the ninth hour, Jesus cried with a loud voice, saying, Eloi, Eloi, lama sabachthani? Which is, being

interpreted as, My God, my God, why hast thou forsaken me? (...) And Jesus cried with a loud voice, and gave up the ghost.” (The King James’ Bible, 1611/2001, Mark 15: 33:34, 37).

Luke in his reporting of the events says that „And it was about the sixth hour, and there was a darkness over all the earth until the ninth hour. And the sun was darkened, and the veil of the temple was rent in the midst. And when Jesus had cried with a loud voice, he said, Father, into thy hands I commend my spirit: and having said thus, he gave up the ghost“(same, Luke 23:44-46). Note that in this sense “gave up the ghost” means: breathed his last. In reference to the ‘witching hour’ which is between 3:00 am and 4:00 am, people believe that the whole purpose of the main anti-hero of the world, the devil, was to mock God by inverting the time of his death (which is then 3:00 am), the Dark Lord or Satan, as the Christians call it, opens the portal.

Continuing the ‘village story’ and in the direction of the old man who is taking a walk during the forbidden time, he usually comes across the crossroads where the devil meets him, but in the form of a well-known vampire. Regarding the crossroads, Kulišić et al. (1970) define them as the places where the dead once used to be buried. There also the sick were brought out to be asked for forgiveness, and the avengers would summon their dead and curse all those who caused any harm to them. Therefore, it is clear that crossroads carry, as people would often say, ‘negative energy’ and the reason why it was heavily avoided. The vampire itself is a story that has already been told a long time ago but in Slavic mythology, and even to this day, it is anything but the smooth gentleman from the American films about Dracula.

The Serbian Vampire, who is known under many names and forms, does not wear a Versace suit, but most often a Serbian national clothes, the one for everyday work. The one he wore before he died and ‘rose from the dead (“Povampirio se” or

“povampiriti se” in Serbian denotes once a living person who became a vampire by either an unknown cause(usually explained by a sinful life) or as a victim of another vampire.

In the Balkans there are many superstitions which ‘explain’ how does one become a vampire. Example: If a cats jumps over your dead body during wake. To prevent this and other misfortunes from happening, people ‘guard’ the deceased for a period of time, which is called ‘wake’). A vampire can also be a woman, of course, because even though the South-Eastern Balkans has for centuries carried the Western label of gender, the liberally and democratically unconscious part of Europe, a Serbian peasant woman can be a vampire and take revenge on all the men who may have rubbed her the wrong way.

It is clear that chase is about a whole host of dark motives and accompanying elements from one getting answers to three main questions or three key tasks:

1. To identify through the mentioned three focal fields everything that is the main interest of the mythological aspect and accompanying beings and phenomena. Creatures that do not belong to the material world should not exist or once belonged, and now appear after death and against reason. They can be of human, animal, mixed, or completely undefined origin. They are followed by various processes of summoning, rejection, and protection.
2. To compare the mentioned elements, find their common points, as well as differences, and determine the purpose of existence from the very beginning, up to the present day.
3. To explore the phenomenon of the mythological and supernatural beings from the present life among the people.

Methodology

The already existing data was processed in the form of the mentioned collections of folk tales and

the modern literature from which the conclusions and comparisons were drawn. Regarding the most important part, the interviews as a focal point are envisaged in the following forms:

The storytellers convey their experiences with inexplicable events that may or may not be real. What is the content of that experience has already been explained in ‘the third field’ segment as one of the three key ones. The interviews are unstructured and semi-structured, that is, in order to achieve the effect wanted and to relax the storyteller. In general, pre-determined questions are not formulated, and the natural conversation is created for the sake of greater freedom for the storyteller. In addition, generic questions are present and are logically asked to each person providing basic, personal information about him/her.

The goal is for the quality of the conversation to be reflected in a live encounter and a conversation ‘within four walls’, in the place where the person lives. That is the primary objective but in the event that where it is technically impossible to carry out the aforementioned, the interviews are conducted via the online platform. Another type of quality looked for through interviews is usefulness or the quality of the information itself. It is much more useful for the research itself if the person interviewed has personally experienced something that he is telling about. Following that, other people’s experiences, that is, experiences from another source, are classified as useful information, but of lower quality. In any case, any rich experience is welcome and recorded.

Conclusion

In the end, the main tasks of the mentioned dissertation were identified and also the foundations of folklore traditions, found in collections such as those of Vuk Karadzic. However, what was found in them, the mythological and supernatural

elements, was also found in contemporary literature. In the end, the greatest focus was on the interview method with storytellers who possess their personal stories that they accept to share in confidence. The background of the story is the entire world, which in the logical realm of science is characterized as ‘mythological’, and in this article, a picture was created that tells about all the cultural creations of man that influenced the appearance of witches, pagan deities, vampires, fairies and the cult of death in general. The hypotheses of this dissertation helped readers to understand why the phenomenon of death gave birth to inexplicable creatures and phenomena that people fear, believe in, or refuse to believe in. That gives the leverage to finally come to the conclusion of why everything mentioned still exists in the people and what their function is.

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**THE SYMBOLIC FIELD OF THE MEMORY SPACE
IN THE BUDAPEST CHINESE-HUNGARIAN BILINGUAL SCHOOL**

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Abstract

The current paper is based on a research which was carried out in the public Chinese-Hungarian bilingual school in the 15th district of Budapest. The bilingual school transmits cultural memory by organizing activities such as traditional Chinese festivals and rituals and integrating practices. The main objective of the paper is to present and to interpret the Festive ritual elements and those kinds of rituals that constitute the school's symbolic field of memory

Keywords: Chinese-Hungarian bilingual school, collective memory, festive rituals

Discipline: cultural anthropology

Absztrakt

A KOLLEKTÍV EMLÉKEZET SZIMBÓLUMAI EGY BUDAPESTI KÍNAI-MAGYAR KÉT TANÍTÁSI NYELVŰ ISKOLÁBAN

A tanulmány arról a kutatásról számol be, amit a Budapest 15. kerületében található kínai-magyar két tanítási nyelvű iskolában került kivitelezésre. Az iskola különböző rendezvények szervezésével hozzájárul a kulturális emlékezet közvetítéséhez. Jelen tanulmány elsősorban azokat az ünnepi rituálékat mutatja be, amelyek fontos szerepet töltenek be a kínai kulturális emlékezet rekonstruálásához és újraértelmezéséhez.

Kulcsszavak: Kínai- Magyar Két Tanítási nyelvű iskola, kollektív emlékezet, ünnepi rítusok

Diszciplína: Kulturális antropológia

This study was conducted in the public Chinese-Hungarian bilingual school (Magyar-Kínai Két Tanítási Nyelvű Általános Iskola és Gimnázium) in the 15th district of Budapest. From Pierre Nora's point of view, the school is a typical "site of memory" that unites three meanings: the material field of memory, such as sculptures and calligraphic paintings; the symbolic domain of memory, such as festivals and rituals; and the functional field of memory such as Chinese textbooks (Nora 1989, 18.). These sites of memory reconstruct and reinterpret the past, shaping Chinese-Hungarian cultural memory today. As for the symbolic field of memory, one can agree with Connerton (1989) that past imagery and memory knowledge are conveyed and maintained through (more or less ritualistic) performances. As Connerton argues, ritual performances require festivals because "the regular repetition of festivals and rituals ensures the transmission of knowledge that consolidates identity and thus reproduces it in a cultural sense" (Connerton, 1989). The bilingual school transmits cultural memory by organizing activities such as traditional Chinese festivals and rituals and integrating practices. The paper will focus on the Festive ritual elements and rituals that constitute this school's symbolic field of memory and discuss how these rituals and festivals have reconstructed or reinterpreted Chinese cultural memory.

The Rituals of the symbolic field of memory

Pierre Nora, in discussing the "lieu de memoire," argues that "lieux in three senses of the word-material, symbolic, and functional" (Nora 1989,18). In talking about the symbolic field of the sites of Memory, Nora argues, "since memories are crystallized and transmitted from one generation to the next, but it is also symbolic. Since it characterizes, by referring to events or experiences shared by a small minority, a larger group that may not have participated in them" (Nora 1989,19). In the case

of the Hungarian-Chinese bilingual school, the "events and experiences" are the festivals and rituals. The symbolic field of memory is embodied in the school through various festivals and rituals. In other words, cultural memory serves to condense the past into a system of symbols. Through festivals and rituals, the image of memory is presented in the present, thus transmitting its stored values and behavioral norms to the collective members to consolidate the collective identity.

To explain how the condensed symbol system works, Rigney (1990) introduces the term 'convergence' into the discourse of cultural memory studies. Cultural memories tend to 'converge and coalesce' into a lieu de memoire. For example, the school rituals of national commemorations include drama performances that bring together stories, iconic images, and themes from the past to form a site of memory. The meaning generated by the play is then brought together and condensed into this site of memory. But, for each rememberer, this place of memory is not a static, fixed repository or storehouse of memory. In this process, memory is dynamic. People reconfigure their relationship to the past while remembering and reorienting their relationship to established and emergent sites of memory. Relationships mean that memory becomes an active symbol of connection between the past and the present; it is both a symbol that preserves earlier stories and relates to the past from a particular point in the present. Erll and Rigney argued, "'remembering' is better seen as an active engagement with the past, as performative rather than as reproductive" (Erll and Rigney, 2012, 2.).

Not only this, but it is worth noting that different memory individuals behave differently regarding script replication. When I asked one of the Chinese students who participated in the performance, all she knew was that it was a drama performance on 23 October to celebrate a revolution in Hungary. It is possible to face other Hungarian students and stand on the stage, watch the performance, or just

hear about the 23 October revolution to unfold the meaning or connect it to a specific image, narrative, film, etc. But as Rigney (2005,14.) puts it, memory sites „are defined by the fact that they attract the intense attention of the person doing the remembering, thus creating a self-perpetuating vortex of symbolic investment”. That is, whether Chinese or Hungarian students, „When individuals and groups express or embody or interpret or repeat a script about the past, they galvanize the ties that bind groups together and deposit additional memory traces about the past in their minds. These renewed and revamped memories frequently vary from and overlay earlier memories, creating a complex palimpsest about the past each of us carries with us” (Winter, 2010,11.).

The work of the symbolic system in the ritual elements of a ritual or festival event is the work of the symbolic field of memory. Rituals are symbolic systems, and as Turner argues (1973), the ritual symbol is “the smallest unit of ritual which still retains the specific properties of ritual behavior”. That is, ritual is a symbolic aggregate. The symbolic object and the symbolic behavior in the symbolic form are the basic units that constitute the ritual pattern. It is evident that in these sites of memory, ritual conveys meaning primarily through its symbolic presence. As Nora (1989,19.) puts it, “Even an apparently purely material site, like an archive, becomes a lieu de mémoire only if the imagination invests it with a symbolic aura. A purely functional site, like a classroom manual, a testament, or a veterans’ reunion belongs to the category only inasmuch as it is also the object of a ritual”.

Applied to school rituals, and symbolism consists of a cluster of symbols hung in a physical object. It becomes “a world of meaning, a system of symbols using sensual means as symbols of meaning” (Xue, 2003, 39. - Author’s translation).

Geertz (1973) sees ritual as a system of symbols around which people construct their own cultural stories and through which they can know the world

by interpreting and explaining rituals. In other words, ritual is a unique knowledge system that uses symbols to perform symbolic acts and symbolic thoughts to achieve symbolic meanings. Ritual symbols reflect not only the requirements of the ritual itself but also the basic requirements of social existence and the values shared by people. In the process of identifying and cognizing ritual symbols, participants can obtain subtle indoctrination from the symbols. School rituals are the process of performing a series of symbolic acts according to certain cultural traditions, following certain norms and procedures. The cultural meaning can only be stored in the symbols, so the display and interpretation of typical symbols in the rituals help the students understand the cultural context of the rituals. For example, the cultural connotations of flags, ribbons, and emblems are explained during the graduation ceremony for Hungarian Chinese Bilingual School; the cultural connotations of Chinese red decorations and the Chinese Lunar New Year are introduced during the Chinese Lunar New Year Celebration.

In commemorative ceremonies, events, times, and people are told through drama. All of these contribute to the students' gaining an understanding of the cultural connotations.

Some of the symbols in school rituals point to known facts, and some are condensed forms. Turner (1967) states that condensed symbols' meaning touches the deeper and deeper roots of the subconscious and spreads their emotional qualities to all kinds of actions and situations that are far removed from the original meaning of the symbols. It is evident that the presentation and interpretation of symbols of school rituals not only help students understand the cultural context of rituals but also stimulate their emotions and cultural memory. As Turner points out, crude, primitive emotions become noble because they are associated with social values, and in this case, tiresome moral constraints are transformed into “a love of virtue”

(Turner, 1967). Thus, the meaning of the existence of school rituals is not limited to the influence of the moment but points to the entire daily life of the students in school. And rituals exist to influence reality through symbols. For example, the national anthem and the standing posture of teachers and students during the school's celebration of the Chinese National Day and Certificates and body postures in award ceremonies are all symbolic prototypes of educational rituals.

In addition to the symbolic narrative of ritual, we should also be concerned with the performative nature of ritual. Performative acts rehearse and complement emotions, and such emotions give the initial memory or story embedded in them an adhesive power that resists the erasure of memory or forgetting. Thus, emotions are permanently inscribed in the performative act in general and the performance of memory in particular. Another example is the line on the play performed on 30 October 2022, which reads:

„Valami szálló ragyogás kél,
valami szent lobogás készül.
Zászlóink föl, ujjongva csapnak,
kiborulnak a széles útra,
selyem-színei kidagadnak:
ismét mienk a pesti utca!”

(Sources from the fieldwork site, recorded by the author on October 23, 2022 at the Hungarian-Chinese Bilingual School).

The lines are described in descriptive language light and fire rising, flags flying, and colors swelling. The lines describe the light and fire that represent the light in descriptive language as if a sacred baptism. Along with the lines, the students held red flags, and then a crowd appeared on stage to show the flag flies on the road. And someone shouted a slogan, “ismét mienk a pesti utca!”.

The performative utterances with costumes, music, and body movements bring the atmosphere to the story's time. That is, the emotions are

embedded not only in the story but also in the act of performing. Further, in addition to the symbolic utterances described above, the ritual is narrated as a speech act. Most rituals have a verbal component, such as the oral school ritual, which is an obvious speech act. Austin (1962,1970) developed a celebrated theory of performativity in speech acts. This theory argues that performativity is not just descriptive or performative. Performativity describes the reiterative power of discourse to create and produce the phenomena it regulates and constrains. For example, in the 2016 Chinese Ambassadorial Scholarship award ceremony at the Hungarian-Chinese Bilingual School, the Ambassadorial Scholarship was announced by the principal officer of the school. As the theory holds, at the time of the announcement of the Ambassadorial Fellowship, this event indicated that it had happened. School rituals have taken on a much richer meaning. At this point, we think it is time to define the ritual or ritual elements of the symbolic field in school, the main object of study in this research. Turner (1973, 1100) believes that „A ritual is a stereotyped sequence of activities involving gestures, words, and objects, performed in a sequestered place and designed to influence preternatural entities or forces on behalf of the actors' goals and interests”. It can be seen that the ceremony involves events, people, and places to carry out activities.

The ritual elements in school ceremonies or festivals described in this article are activities centrally arranged or programmed to be performed in the school memory space with the help of symbolic cultural symbols (body movements, objects, speech acts) that reflect Chinese cultural memory.

School Rituals and Cultural Memory

There are various rituals in the school field. Wang Haiying (2007,14.) has classified school rituals into four categories, 1) ritualized. It includes

a flag-raising ceremony, initiation ceremony of the team, adult ceremony, etc., 2) Educational rituals. For example, classroom teaching rituals between teachers and students and daily educational ritual activities. 3) Ceremonies. There are new students opening ceremonies, graduation ceremonies, etc. 4) Celebrations in festivals. There are festivals, school celebrations, special events, etc., which are both entertaining and educational. The same applies when applied to the case of the Hungarian-Chinese bilingual school.

Further, in this study, I divided the rituals into three categories: transitional rituals, daily rituals, and festive rituals. Transition rituals, in this case, are mainly rituals that involve the change of students' identity, such as the opening and graduation ceremonies. Daily rituals are the rituals of interaction between students and teachers and even include the rituals of class dismissal. Festival traditions refer to the ceremonies that will be held based on traditional cultural festivals. As an organizational form of cultural memory, school rituals consciously shape collective identity and guide the production of cultural actions by storing, accessing, and communicating culture.

In the ritual exhibition, the cultural memory attached to the media, such as images, texts, costumes, dances, music, body movements, and facial expressions, is presented in a concentrated way to provide markers for group members to carry out their identity. In terms of the characteristics and mechanisms of ritual storage of cultural memory, rituals in Hungarian Chinese bilingual schools can activate students' cultural memory through the following ways. The first is to deepen students' impressions of the ceremony through proceduralization. In the view of Connerton (1989), ritual is a formalized language. For the speaking and use of this language, there is a tendency to stylize and typify it, consisting of a largely unchanging series of words. To some extent, the stylization of these languages is the programmatization of ritual

language. The programmatic style of ritual language does not originate with the current performers but is already present in such ritual practices. According to previous codes and rules, words and actions are performed as in previous ritual situations. The program of the ritual is predictable from the beginning of the speech act to its end, and as soon as it begins, you can only continue in a proper ritual sequence.

Taking the Hungarian-Chinese Bilingual School graduation ceremony as an example, comparing the three 12th-grade graduation ceremonies in 2020, 2021, and 2022 there are incredibly similar processes. Taking the 2021 12th grade graduation ceremony as an example, the following is the manuscript of the fieldwork record of the author (the manuscripts of the fieldwork are derived from the author's records.):

- The host made an opening speech and introduced the purpose of the meeting.
- Entrance of the 12th-grade graduates (the flag bearer representative raises the flag, and the two deputy flag bearers guard the flag. Afterward, the class teachers led the 12th graders to enter in line with the music in full dress.)
- Speeches by the principals of both schools.
- The host invited the representatives of the graduating class to tie the white ribbon of the graduating class on the flag of the Hungarian-Chinese Bilingual School.
- Representatives of the graduates put on the school badges for the principals and vice-principals of both Hungarian and Chinese schools.
- The Hungarian principal put on the school emblem for the class teachers of the 12th grade.
- As the first step towards the end of the graduation school year, the class teachers put on the badges for the students one by one. As the students' photos and names were shown on the big screen, students walked from the stage to the front of the stage, where the class teachers

put on their badges. The student stood slightly sideways and faced the teacher. When the pin was placed, the student and the teacher stood together for a few seconds in front of the stage, and then the teacher stepped back to the front side of the stage and watched the student walk from the front to the side of the stage. At the centre of the stage, the student took a picture with their picture and name and stood for a few seconds before retreating to the upper side of the stage. The teacher watched the student push into the side and then stood forward, looked ahead, and greeted the next student to repeat the process of wearing the badge. A student's badge-wearing lasts for 30 seconds, and then the previous step is repeated.

- After the completion of the badge-wearing ceremony, male students stand on the left side of the stage together with the three flag bearers, and female students stand on the right side of the stage, standing sideways. In the end, a group photo of the whole graduating class and a group photo of each individual's headshot is displayed on the screen. The photo was bilingual in Hungarian and Chinese. The titles are Hungarian-Chinese Bilingual School 2017-2021; each person's mugshot noting their name; the class teacher's photo and name; and the group photo.
- A representative of the 10th-grade students sang a song to give birthday wishes to the 12th-grade students. During the performance, the graduating class students stand on the stage in the same position.
- The teachers of the Chinese Embassy will present the souvenirs of the Embassy to the teachers and students of the graduating class.
- The host gave the curtain call speech.
- The class teachers led the 12th-grade students to follow the rhythm of the music clockwise on the stage and leave the stage in order. In the end, the class teachers led the students to form

a single line, with the primary flag bearer and two secondary flag bearers following at the end of the line to leave the stage. All teachers on the field watched the students leave.

The above ceremony was the second graduation ceremony for the 12th grade at the Hungarian-Chinese Bilingual School. It was held against the backdrop of the pandemic, and students wore masks to the ceremony, and the school curtailed the celebratory performances, eliminating parental attendance and dances. The graduation parade and the wearing of the badge were retained as a major part of the graduation ceremony.

Compared to 2022, the graduation ceremony was expanded to more than two hours after the epidemic subsided. The ceremony consisted of a graduation parade, badge-wearing, a graduation program, and a graduation dance. However, by comparing the graduation ceremony process over the three years, the general process is similar, and the programmed language of the ceremony is also determined to a certain extent through the process or procedure of the ceremony.

The graduation ceremony's name is "XX Hungarian Bilingual School Graduation Ceremony". The programmed language of the ceremony tends to be stylized and consistent, and the performance of the ceremony only needs to follow the rules and progress step by step. So as Connerton (1989, 59.) argues, "the limited resources of ritual posture, gesture, and movement strip communication clean of many hermeneutic puzzles". Thus, the rituals are performed only under the procedures and in a step-by-step procedure. It is worth noting that during the ceremony, the procedural language throughout the ceremony was bilingual - Hungarian and Chinese.

From the presiding officer's speech, the principal's speech, and the students' speeches, the language was Chinese and Hungarian together. Using Chinese characters in this school ceremony sets it

apart from other schools in the area. Chinese characters are inscribed with the long-standing cultural memory of the Chinese people. The sense of community of the Chinese nation, which is embedded in the symbolic system of Chinese characters, is first and foremost characterized as an identity. Through the ideographic system of Chinese characters, students can look back on history and feel the splendour of Chinese culture, constantly evoking the collective memory and emotion of the Chinese nation.

In other words, symbols not only have the function of expressing meaning but also can evoke human emotions (Hülst, 1999). Unlike the Western system of epigraphic writing, Chinese symbols carry meaning in form and lead the human mind to cultural, philosophical, and value levels through visual intuition. It takes the collective memory of the Chinese nation's sense of community identity. In particular, when the 12th-grade student representatives came on stage, one tied the ribbon representing the class to the flag. Another student stood at the centre of the stage and explained the meaning of the ribbon tied to the flag in Chinese: „The ribbon tied to the flag also ties our memory of this school. The motto on the ribbon is, ‘Wherever we go, we will do our best’”. In this process, the Chinese characters act as ideograms for cultural memory, creating an atmosphere that invites memories and acting as a catalyst to activate students to carry them. Chinese characters carry the idea of language and remind Chinese memory. Students learn about China's culture and traditions over thousands of years through Chinese characters, a medium with a long history of symbols.

Also noteworthy in the graduation ceremony program was the presentation of gifts to the graduating students by the representative teacher of the Chinese Embassy in Hungary, which became a distinctive feature of the graduation ceremony process. When the host reads out the presence representing the state's power, the embassy's

representative teacher comes up to the stage to hand out the gifts to the students and shake hands with them. The body posture and movement formed when the student receives the gift create a body memory. In this regard, “as the material base of the subject of memory, memory is most basic, and primarily a bodily memory, the subject of memory is essentially embodied as a conscious and emotional body.” (Zhao, 2013, 89.). It can be seen that as the material basis of memory, the experience of the body is perceptible and recognizable. It is centred on bodily experience from the objective and real physical world, and memory is preserved through body language. And in rituals, with the symbolic culture constructed by the symbolic system, school rituals can accomplish the transmission of the national voice and humanistic values. The symbolic power of the state encourages the participants of the ritual. This means that the students will also feel the great hope and blessing of the Chinese Embassy for the graduates when they receive the gifts. The ceremony participants can acquire the cultural meaning symbolized by the ceremony through their participation. In this case, it means the cultural memory that is officially transmitted, the Chinese memory.

The programmatic nature of school rituals can be seen to reinterpret Chinese cultural memory. From this, we realize that cultural memory cannot be spontaneous. Instead, cultural memory is formed in schools with the help of ritual system symbols. The communicative space as a cycle of cultural meaning involves, first and foremost, festivals, celebrations, and other elements of ritualistic, celebratory behaviour. In such celebratory communicative acts, cultural memory is displayed through the totality of multimedia with symbolic forms. The primary purpose of these acts is to secure and perpetuate social identity (Erl, Nünning and Young, 2010). By bringing traditions to life through reminiscence, school rituals bring knowledge systems and cultural memories that must be transmitted into the present

and guide participants to understand their cultural significance. By relying on various traditional festivals, various school rituals are conducted to not only recreate the scenes of traditional festivals but also to convey the idea of their traditional cultural connotations. For example, the traditional festivals represented by the Spring Festival, Dragon Boat Festival, Mid-Autumn Festival, and National Day convey traditional cultural concepts such as family reunion, respect for ancestors, and patriotism. Shils (1971) states that „tradition is a way of doing things that have been passed down from generation to generation around different areas of humanity. It is a cultural force that has a normative effect on social behaviour and a moral appeal, as well as a deposit of creative human imagination over the course of history”. Traditional cultural symbols highly condense the cultural tradition of a country or nation and have a tenacious vitality and a broad social foundation. Using traditional cultural symbols to activate cultural memory requires school ceremonies to express traditional cultural symbols in a contextual and exhibitionistic way. Among them, contextuality emphasizes that school ceremonies evoke analogous associations or memories of traditional cultural symbols through specific situations. For example, the first item of the Chinese National Day commemorative ceremony was playing the Chinese national anthem, “March of the Righteous and the Brave”, with all standing. Students stand and are placed in a unique musical situation, which can easily evoke emotional belonging.

Students and teachers stand at attention when the Chinese national anthem is played. As a symbol of cultural memory, the national anthem conveys the voice of the state and symbolizes the state's indoctrination of students. Students are attentive in this context and solemnly participate in the ritual performance. During this time, those things that belong to the self are quietly concealed, allowing the mysterious forces behind the ritual to paint and

transform their memories. The ritual generates a passionate public emotion, a solid collective emotion that, because of its resonance, evolves into the common memory of the group. It is not only the memory of the school but also the memory of the political symbols of the ritual, which eventually evolves into the cultural memory and identity of the educated. It can be seen that school rituals are a series of symbolic acts performed according to certain cultural traditions, following certain norms and procedures. Cultural meaning can only be stored in symbols, so the typical ceremony symbols are displayed and interpreted. For example, at the graduation ceremony, the cultural significance of the badge was explained - the custom of wearing the badge began in 1830 as a tradition, and 12th-grade graduates were eligible to wear the badge belonging to the graduate in the second year of school. At the Chinese Culture Day, the lion dance was explained as a traditional Chinese folklore activity - Chinese folklore tradition believes that the lion dance can ward off evil spirits. Therefore, lion dances were held during the festive season to celebrate the occasion. In the New Year celebration party of the Year of the Ox, the meaning of the ox in traditional Chinese culture was explained - the totem of the pastoral. Also, the custom of the New Year was described - red decorations are a traditional Chinese custom, which holds the desire for beauty and abundance (the interpretations of the ritual symbols are all from the field notes of the author's fieldwork.).

This series of ritual elements are interpreted in addition to the festivals, and the transmission of cultural memory of education is achieved with the help of physical practices. For example, during the Chinese New Year, Mid-Autumn Festival, and Dragon Boat Festival, students are arranged to wrap dumplings, write brush characters and wrap zongzi, among other activities that are distinctive to the festivals. On the eve of the Chinese New Year, Ms Hao from the school led the students to

experience and learn about the traditional food of Chinese New Year, dumpling making. It is also to enhance students' cultural identity through cultural experience. Hans-Georg Gadamer states, „Something is experienced if it is not only experienced but if its experiential presence also acquires a character that gives itself a continuing significance.“ Engaging students in ritual Enhancing cultural experiences reflects the nurturing value of school rituals. Specifically, the national anthem creates a solemn ritual atmosphere in political and commemorative ceremonies. The national anthem tells the nation's history, shapes the country's collective image, and students gain an experience of national identity.

Daily school rituals through classroom rituals Chinese primary and secondary schools have classroom rituals. For example:

- When the teacher enters the classroom door, the class leader calls out, “Students stand up!”
- Then the students stand up and collectively say out loud, “Hello, teacher!”
- The teacher responds, “Hello, class!”
- The class leader then says, “Sit down!”
- When the bell rings, the teacher says, “Class dismissed!”
- When the bell rings, the teacher says, “Class dismissed”, and the students stand up and say, “Goodbye, teacher!”

This experience is practiced in a class at Hungarian Chinese Bilingual School. And in the daily interaction rituals of students, every student will say, “Hello teacher” in Chinese when they meet their Chinese teachers. When they meet their Hungarian teachers, they say hello in Hungarian. Through the daily rituals, students gain experience of the differences between Hungarian and Chinese cultural habits.

The graduation and commencement ceremonies are identity-transformation confirmation ceremonies designed to confer a clearly defined right and

obligation to the new role. The solemn and straightforward atmosphere of the ceremonies allows students to gain the experience of approaching the awareness of their new role.

By adding traditional cultural experiences to the traditional festival-style rituals, students can perceive the wisdom of the ancients in dealing with human relationships and human-nature relationships through folklore experiences. For example, at the 2017 Ambassadorial Scholarship Award Ceremony, Chinese cultural backgrounds were set up to draw pandas, paint panda paper-cutting art, and give pandas eyes. 2020 Chinese National Day and Mid-Autumn Festival were celebrated with experiences of painting the national flag and pandas in the lower grades. Chinese calligraphy, paper-cutting, and Chinese painting experiences were held on the 2022 Chinese National Day. The experience of ritual culture is a reinterpretation of Chinese cultural memory and condensation of individual and collective memories. Thus school rituals that are repeated at specific times can provide a marker for the identity of the collective members.

Conclusion

Regarding the symbolic field of memory, according to Nora, in schools' ritual or ritual elements serve as representatives of the symbolic field. Paul Connerton's (1989) view of the imagery of the past and knowledge of memory is conveyed and maintained through ritual performance. Ritual performance requires opportunity, which compels attention to festivals and festival elements. This is because, as Connerton argues, the regular repetition of festivals and rituals ensures the transmission of knowledge, consolidates identity, and thus reproduces it in a cultural sense. Bilingual schools transmit cultural memory by organizing events such as traditional Chinese festivals and rituals and integrating practices. School festivals and rituals are important vectors of symbolic forms of cultural memory. These vehicles condense the

past into a system of symbols and present images of memory for representation and interpretation through festivals, ritual celebrations, and other forms. As Assmann (2011) argues, cultural memory is fixed through objective externalizers such as words, images, and dances due to its reliance on highly formed rituals, festivals, etc., and it has a dedicated traditional bearer. The regular repetition of rituals and festivals ensures the spatial and temporal cohesion of the participating ritual groups and consolidates the transmission of identity knowledge. This process transmits the stored cultural essence of the past to collective members to consolidate identity. As with this act of celebration, cultural memory is displayed through diversity with symbolic forms whose primary purpose is to secure and perpetuate social identity.

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**THE DONKEY DIED, THE SNAKE (ALMOST) SURVIVED
KUWAITI FOLKTALES, WHAT HAPPENED TO HEMARAT AL GHAYLA AND NESÓP?**

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Abstract

The current paper is based on the conception that Kuwaiti people are forgetting their stories and it is largely down to the fact that the new generation of Kuwait hardly remember the fictional figures of the *Tantal*, *Al Seolu*, *Sehaila Um Al-Khalajeen*, *Um Al-Sa'af Wa-Alleef*, *Al-Duaidea*, *Bu Darya*, which is mainly due to historical and social background. The article intends to dwell on these types of stories and their meaning, focusing on the moral context, as well.

Keywords: Kuwaiti folktales, anecdotes, moral issues

Diszciplina: Cultural Anthropology

Absztrakt

A SZAMÁR HALOTT, A KÍGYÓ (MAJDNEM) TÚLÉLTE. KUVAITI NÉPMESÉK, HOVA LETT HEMARAT AL GHAYLA ÉS NESÓP?

A tanulmány kuvaiti népmesék narratív elemzésével foglalkozik. A tartalomelemzés egyik legfőbb célja, hogy az elemzés tárgyát képező irodalmi művek elemzésén keresztül megfektse az adott éra erkölcsi kontextusát.

Kulcsszavak: Kuvaiti népmesék, anekdoták, erkölcsi kérdések

Diszciplina: Kulturális antropológia

Striking recognition it is, but Kuwaiti people are forgetting their stories; Hemarat Al Gayla (afternoon's donkey) was not only forgotten, but it is apparently dying. The new generation (as the locals call it today) of Kuwait hardly remember the fictional, or in other words fantastic figures of the Tantal, Al Seolu, Sehaila Um Al-Khalajeen, Um Al-Sa'afWa-Alleef, Al-Duaidea, Bu Darya (more: Németh, 2022), due to various historical and societal aspects that the present article does not discuss. Some stories however survived on the fading pages of old books that lay on the back shelves of libraries. Dusting them, a fascinating world is revealed to the reader, who is eager enough to read through the descriptions written by travelers. One of these works is *The Arab of the Desert - A Glimpse Into Badawin Life in Kuwait and Sau'di Arabia* (1949), authored by H.R.P. Dickson.

This breathtakingly lengthy work describes the material culture, customs, and traditions of the Arabs, living in the Arabian peninsula in absolute detail, and with (for a political agent at least) surprising ethnographic accuracy. The 666 pages book covers all subjects from the traditional ways of deciphering the deeper meaning of dreams to the incredible tales that used to circulate in the area.

The author, Dickson Harold Richard Patrick (1881-1959), was in charge of the Political Agency in Bahrain from 6 November 1919 to 28 November 1920 and worked in Kuwait from 1929 to ca 1936, during which time he amassed information for his colossal book on *'The Arab of the Desert: A Glimpse into Badawin life in Kuwait and Sau'di Arabia'* (Dickson, 1949), which remains one of the most authoritative works on the subject. His second book was entitled *'Kuwait and her neighbours'* (Dickson, 1956). To explain his personal connection to the Arab of the desert, in

the foreword he writes: "I was born in Beyrout, Syria, in 1881, and as a small child was taken to Damascus, where my mother's milk failed early. It so happened that Shaikh Mijwal of the Mazrab section of the Sba'a, the well-known sub-tribe of the great 'Anizah group was in Damascus at the time, and gallantly stepping into the breach, he volunteered to secure for me a wet nurse, or foster mother from among his tribes-women. A Bada-wiyah girl was duly produced, and according to my mother's testimony, I drank her milk for several weeks. This in the eyes of the Badawin entitles me to a certain "blood affinity" with the 'Anizah, for to drink the woman's milk in the desert is to become a child of the foster mother. This fact has been of assistance to me in my dealings with the Badawin, of the high desert and around Kuwait."

The political nature of such decisions cannot be overlooked. The author was the child of a diplomat delegated to the Middle East in a historically definitive period of time. Sheikh Mubarak Al Sabah signed the Anglo-Kuwaiti Agreement (1899) with the British government, making Kuwait a British protectorate until 1961. This gave Britain exclusive access and trade with Kuwait while denying Ottoman provinces to the north a port on the Persian Gulf (Casey, 2007).

In other words, in addition to the Islamic imperatives to seek peace and be charitable, it was also in the best interest of the ruling tribes to maintain a close and promising relationship with British diplomats. Welcoming a British as the child of the tribe has secured accords with the allies. Not surprisingly, Dickson maintained a very deep connection to the Arabs, especially the Badawin culture, however, these connections were not without limitations. Close ties with the ruling tribes and the Badawins also meant having limited access and/or interest in the other tribes in Kuwait, therefore his work is although one of the most thorough

ethnographic descriptions of Kuwait of its age, it does not necessitate that it is exhaustive to all tribes of the area in the mentioned era.

Besides, assisting a British diplomat's family in need of help was proven to be one of the most fruitful and smooth diplomatic actions of their age in Kuwait, which provided a significant opportunity for the author to build relationships, observe and describe the culture, and last but not least, pursue his political mission. He was not only a political agent but an important factor in the preservation and presentation of the Kuwaiti culture and traditional lifestyle. The Colonel spent a formidable amount of time camping in the Kuwaiti wilderness with his family during his missions in Kuwait. This allowed him to pen his most important work, which was heavily illustrated by his wife, Violet Dickson, the author of *Forty years in Kuwait*.

Although he transcribed the stories heard from different tribesmen in Kuwait, the storytellers were of different nationalities, and the narrated tales took place in different cities in today's Iraq (Basraa) and Kuwait besides various areas of Saudi Arabia. From the beginning of Kuwait's history though, the people of Iran, Saudi-Arabia, Iraq, and even Africa have mingled and settled in the territory (under the Ottoman Empire) that is called Kuwait today. Taking a look at the genetic makeup of the people of Kuwait, the research shows the following;

„The Population of Kuwait comprises early settlers that include tribes from Arabian and Persian countries, and nomadic Bedouins of the desert. By way of analysing genome-wide genotypes from 273 Kuwaiti natives, we recently demonstrated three distinct genetic subgroups in Kuwaiti population: Kuwait P (KWP) of Persian ancestry; Kuwait S (KWS) of “city-dwelling” Saudi Arabian tribe ancestry, and Kuwait B (KWB) that includes most of the “tent-dwelling” Bedouin participants (recruited to provide samples for genotyping). The

KWB is distinguished from the other two groups by a characteristic presence of 17% African ancestry (ranging from 11.7% to 39.4%); Arabian ancestry is seen more in the Saudi Arabian tribe ancestry subgroup (at 69%) than in the Bedouin group (at 40%). [...] The observed genetic compositions in the Bedouin substructure of Kuwaiti population: European (French_Basque)–11%; Arab (Negev Bedouin)–45.0%; sub-Saharan African (Biaka_Pygmy)–17.0%; and West Asia (Druze, Brahui)–25%” (John et al., 2014)

Although he transcribed the stories heard from different tribesmen in Kuwait, the storytellers were of different nationalities, and the narrated tales took place in different cities in today's Iraq (Basraa) and Kuwait besides various areas of Saudi Arabia. From the beginning of Kuwait's history though, the people of Iran, Saudi-Arabia, Iraq, and even Africa have mingled, and settled in the territory (under the Ottoman Empire) that is called Kuwait today (John et al., 2014).

Taking into account the connection and interference of peoples, it is also reasonable to assume that they would share the same typology and “genotype” of stories; in other words, different variations of the same narrations will be told and recorded throughout Kuwait and her neighbours, and Kuwait hasn't necessarily developed a subgroup of stories that is particular only to the local groups within the wider area. More accurately, the same genotype of South Arabian, East-and North-African, Iranian, and Badawin (“desert-dwelling”) variations will blend in the discussed space. Therefore, it is righteous to consider reciting those tales and stories that are in use by the local community and unweave the context, that is used among their narrators and agents, the local community members, regardless of their origins.

Among the stories transcribed in the mentioned book, four are dedicated specifically to Kuwait, one doesn't declare the origin or the local; Shaikh Mu-barak of Kuwait and the amorous fidawi, Captain

Shakespear and the Kuwait Boatman, are anecdotes, true stories, and stories of Kuwaiti history. The other two, Nesóp and the Snake, and Ras al Dhíb are animal fables, and The Hattáb (wood-cutter) and the Khaznah (treasure) is a complex narrative, most probably the combination of multiple stories. Dwelling through Kuwaiti stories, the narrations of the interviewees seem to come to life. All the interviewed members of the community have mentioned two critical characteristics of the tales they used to hear (but were not able to recite upon inquiry). First, the narratives always hold a moral, therefore narration consistently implies an educational purpose, which is clearly an Islamic principle, consensual among Islamic scholars. Second, in the great majority of cases, these are either anecdotes of real people, whose real-life actions either became famous (the protagonist achieves a higher rank throughout the conflict) or served some moral purpose to the local community. This article aims to dwell on these stories and their meaning, deciphering their moral context.

Shaikh Mubarak of Kuwait and the Amorous *Fidawi* (a personal bodyguard, and/or a servant closest to the ruler) (A true story)

This story is about a seemingly honest servant (the personal bodyguard) to Shaikh Mubarak. As of the written narration of H.R.P. Dickson, a servant was doing his job greatly, and although the shaikh knew all about his mistakes, he forgave him because of his good work on the other hand. The servant had one weakness though, and it was women. One day, he started a fatal affair with one of his neighbour's wives. The affair did not remain unnoticed or a secret, as upon the gossip and warning of the neighbours, the husband caught them "*flagrante delicto*" with the help of three other male witnesses. Being taken before Shaikh Mubarak, the ruler reasoned with the servant about his decision that was made in the favour of the

cheated husband when he asked for justice. The shaikh explained thoroughly that until this mistake, he had forgiven all the other faults of his servant, as he was doing such a great service that it outweighed the bad, he had done. However, adultery that is actually proven, is such a great sin, that it cannot be overlooked, and he had the *fidawi* executed (beheaded).

As for Islam, the punishment for adultery is death by stoning and for fornication it is flogging, which are commonly referred to under the same term, *zinā* (زِنَا); „Receive teaching from me, receive teaching from me. Allah has ordained a way for those women. When an unmarried male commits adultery with an unmarried female, they should receive one hundred lashes and banishment for one year. And in case of married male committing adultery with a married female, they shall receive one hundred lashes and be stoned to death.” (Hadith, *Kitab Al-Hudud*, 17:4191).

The act has to be proven however by 4 male witnesses (they have to catch the couple "in the act", only after that the crime is considered proven); „And those who accuse chaste women then do not bring four witnesses, flog them, (giving) eighty stripes, and do not admit any evidence from them ever; and these it is that are the transgressors. Except those who repent after this and act aright, for surely Allah is Forgiving, Merciful.” (Qur'an, Sura 24 (An-Nur), ayat 4–5)

This tale is the sheer example of what Muslims repeat in their daily lives, explaining the rules of their religion to non-muslims; there are rules, and all human beings are fallible, we all do make mistakes, and can repent to God, recant our sins, however, there is a line that can never be crossed under any circumstances. Adultery, and/or fornication is a deadly sin under Islamic laws, so the narrative is also a warning to everyone that not even those of the highest social status or the strongest *wasta* (a person who liaises during conflicts or has a great influence over decisions due to their status or social network), working under the ruler can get away with violating the law of God,

especially not on a consistent basis. Forgiveness is practised in many different cases, as many are making mistakes while leading a fundamentally good life that serves the community, but there are sins that will always outweigh the good deeds and violate the Deen (The way of life, the religion, the creed, the duty to God) of a Muslim. The shaikh on the other hand could not have denied the wish of the poor husband who brought the sinners in front of him to have justice served. Only the fate of the *fidawi* is narrated in the story, the consequences to the wife remain unknown, as the moral focus, and the conflict of this instance, is not the adultery alone, but the adultery committed by someone of a high social rank and of influence within the local community, close to the ruler himself. Thus, the fate of the cheating woman is irrelevant from the moral point of view in this anecdote, because the narrator is focusing on the social status of the *fidawi*, and the punishment received to the contrary of being the servant of the strongest imaginable *wasta*. To further explain, “*Wasta* may mean either mediation or intercession. It denotes the person who mediates/intercedes, as well as the act of mediation/intercession.

Intermediary *wasta* endeavours to resolve interpersonal and inter-group conflict. A *jaha* (*wajaha*’, a mediation group of notable emissaries sent by the perpetrator’s family to the victim’s family) acts to inhibit revenge from being taken following an incident involving personal injury. The *jaha* seeks a truce between the parties, with the hope of an eventual agreement to resolve the conflict. “*Wasta* as mediation has a long and honourable history. In a tribal setting, *wasta* mediation binds families and communities for peace and well-being in a hostile environment. This face of *wasta* benefits society as a whole, as well as the parties involved. Intercessory *wasta* involves a protagonist intervening on behalf of a client to obtain an advantage for the client - a job, a government document, a tax reduction, and admission to a prestigious university. [...] When the seekers for a benefit are many and the opportunities are few, only

aspirants with the strongest wastas are successful.” (Cunningham and Sarayra, 1994, 29.)

In other words, *wasta* is a person of influence or the use of influence to help the positive outcome of either a conflict or an aspiration.

What the audience would witness through this conflict, is the question of the social role of these two kinds of *wastas* and their limitations. The role of the interceding *wasta* has been a long-term matter of interest in Kuwaiti, and in general Arab society, and the subject of many nationwide discussions, as intercession is considered the means of corruption, condemned by Islamic scholars. Therefore, the recited anecdote is not only a generic moral for the public, but it also intends to paint Shaikh Mubarak as a great mediatory *wasta* who abides by Islamic law and is a role model, while he is also an example of an intercessory *wasta*.

Captain Shakespeare and the Boatman

The next example also presents the reader with insights to the interpretation of the ‘*wasta* phenomenon’, and the author himself notes in his introduction that he is unable to vouch for the accuracy of the story.

Captain Shakespeare was having many conflicts with the then-ruler Mubarak, due to both of them feeling not being treated with the distinguished honour they claimed based on their position and status. Captain Shakespeare was a political agent and a remarkable man, while Mubarak the leader of tribes, and aspiring then-ruler of Kuwait were demanding honour for themselves, which led to a break in the relationship. One day, a struggle started on Shakespeare’s boat for it being used as a bridge, so in his frustration, the Captain threw a poor Kuwaiti in the water, forgetting that a five-pronged Arab anchor was hanging on the side, which the Kuwaiti landed on, dying immediately. Desperate out of guilt, remorse, and fear, Shakespeare accepts the offer of the Director of

Customs (the narrator of the story), to go before Shaikh Mubarak, confess to everything, and offer blood money (ransom) to the family as per tradition, and to show humbleness and regret to the leader. The Shaikh, seeing the intense regret and hearing the humble apologies and the offer of blood money, unexpectedly says: „*My son, - said he - , if the slaying of one rogue of the many rogues that are my subject brings about such desirable results as to make you come to me and beg forgiveness in humbleness and contriteness of heart, why then, go and slay one of my men every day of your life. For were we not at daggers drawn yesterday, and has not this incident healed our wounds today. May you slay a rogue every day, so long as it brings us together like this.*” (Dickson, 1949, 313-314.)

From that day the two men have become inseparable, and peace was restored by paying the blood money to the victim's family. The Islamic purpose of the blood money is to “reimburse” the family for their loss. One type of killing is intentional murder, the other is unintentional.

In case a murderer kills their victim unintentionally as the Captain did, there is an option for paying their dues by blood money instead of their lives as a retaliation. The system of blood money plays an incredible role in the psychology of the victims, and in justice to be served, and it is based on Talion, a principle developed in early Babylonian law, that criminals should receive as punishment precisely those injuries and damages they had inflicted upon their victims.

Granting the victims the power to retaliate against the death of their loved ones in case of intentional killings, helps the process of healing and grief and intends to resume balance. For the unintentional killings on the other hand, whereas remorse and willingness are shown, blood money can be paid, which on one hand is a type of ransom for the murderer's life, from the other hand, especially if the victim is a man, is supposed to replace the income that the victim is not able to provide to the family anymore.

However, the decision of the victim's family whether to forgive the murderer is only one aspect of the outcome, as the judge of the community still can order the penalty, and the family has the exclusive right to reject the ransom and ask for the life of the perpetrator instead of money. For instance, the victim's family can decide to accept the ransom, forgive the perpetrator, whilst the judge will order them to pay the ransom, and put the murderer in jail or even execute them.

The same may happen the other way around as well. In modern Kuwaiti law, the victim or the family is offered the choice of forgiveness, which nils a share of their punishment, however, the mandatory sanction will still remain in force regardless of the decision of the victim and/or their family.

Since Captain Shakespeare did not intend to kill the poor ‘rogue’, the director of customs advised him to offer blood money and show regret, which in this case has been proven to be a feasible solution for the family of the deceased, and a sensible behaviour in the eyes of the Shaikh, who has decided not to further punish the political agent, instead used this very incident to turn their relationship around and pledge him, which once again was proven to be a sensible diplomatic decision. “*And whoever is killed wrongfully (Mazlooman intentionally with hostility and oppression and not by mistake), We have given his heir the authority [to demand Qisaas, Law of Equality in punishment or to forgive, or to take Diyah (blood money)]. But let him not exceed limits in the matter of taking life (i.e. he should not kill except the killer)*” (*al-Isra' 17:33*)

From a comparative, literary aspect, however, the narration corresponds more to the typology of legends than anything else. The story is most probably absolutely fictional, as until now, no traces of the said incidents were found in relevant resources, however, the characters were real historical personas who interacted in real life at the same age and geographical area at a time.

Shaikh Mubarak (1837 – 28 November 1915) was the seventh ruler of the Sheikdom of Kuwait, and the seventh ruler of the Al Sabah Dynasty, who stabilised the continuity of the ascension to the throne within the Sabah family. He signed the previously mentioned Anglo-Kuwaiti treaty in 1899 with the British.

Captain William Henry Irvine Shakespeare (29 October 1878 – 24 January 1915), was a British civil servant and explorer who mapped uncharted areas of Northern Arabia and made the first official British contact with Ibn Sa'ud, future king of Saudi Arabia. He was the military adviser to Ibn Sa'ud from 1910 to 1915 when he was shot and killed in the Battle of Jarrab by Ibn Shraim. Ibn Saud mentioned Captain Shakespeare as the greatest European he has ever met. They fought side by side in 1915, when the Captain died in battle at the age of 36. He received the name "Shakespeare of Arabia" and was buried in Kuwait.

In 1909, Shakespeare moved to Kuwait as Political Agent. In alliance with Sir Percy Cox, he fought a solitary battle during and before WWI. (when he was Political Agent in Kuwait) to gain protection for Ibn Saud, whom he considered the only desert leader able to gain the alliance of the tribes. When war came Shakespeare was sent back to Arabia to bring the tribes over to Britain's side, but, at 36, he was killed at Ibn Saud's side in battle against the pro-Turkish Ibn Rashid of Hail. (Captain William Henry Shakespeare, A Portrait by H V F Winstone, 1976)

The reader might be taken aback by the greatness of the past. The struggles of long-dead heroes who shaped our history through their day-to-day decisions, for this instance, in an age when the fate of countries and their people depended on those decisions. Shaikh Mubarak, Ibn Saud, Captain Shakespeare, H.R.P. Dickson, were not only living in the same era when the Ottomans and the West were struggling for political and economic leverage over the Middle East preceding the First World

War, but they were also effective and operating actors of their age, let alone assumably interacting with one another.

They have taken voluminous actions which shaped not only the political bearings of their own age but defined diplomatic relations and geopolitics for the long term. No surprise thus that these characters and figures appear as heroes and extraordinary people not only through the everyday anecdotes of the common folks but also in contemporary descriptions of their peers. The recited narrations are not only invaluable additions to understanding micro-history but they also inevitably resemble the nascency of legends about King Mátyás, King Arthur, the modern legendary depictions of Ragnar Lothbrok and other Norse Sagas, or even Robin Hood.

In 1912, when this story allegedly took place, the Arab cause was already at the forefront of interest in Saudi Arabia with the support of Ibn Sa'ud, whilst the Pan-Turkic Nationalist agenda was on the rise in Turkey, weakening its leverage over Arabic territories under its control. In this scene, enter the British and their political agents, who support the Arab cause, and are willing to extend their leverage and support over Saud-Arabia, and the area of modern-day Kuwait against Turkish pursuits, limiting Othman control over West Asia and Arabia.

Rolling up the threads to understand the deeper content of this story, two main characters appear in the story in a power struggle. One, is the person in power, leading his people, and the other one is a guest in the eye of the host. The British agent is an agent, helping the Kuwaitis reach their common goals with the British. The narration mentioned that they are both claiming not to be treated with the expected honour. The shaikh only feels that the agent is paying the necessary respect to him when the Captain is begging for forgiveness, cries, and exhibits behaviours of regret and shame. In Arabic countries, being humble and exhibiting "shame,"

hasham, can paradoxically demonstrate pride and honour, which explains why the captain's behavior triggers such an extraordinary reaction from the shaikh who says without hesitation, that if the price of the captain's respect (who here represents the allies, the British) is to kill a servant every day, he will do that. This emphasises on the relevance the shaikh attributes to being treated in an honourable manner, and being honoured and not overpowered by a British political agent. In the incident where the Captain made a mistake that could have easily cost his life, the Shaikh, later on, the ruler of Kuwait - is in a power position that helps him turn the situation around, and turn the power dynamics on his side, showing mercy and generosity. The reaction may be shocking to many, however, the author of this article hypothesised that this narration is more of a grandiose metaphor that is meant to express the importance of bilateral relations and their respectful nature than a true story. Honour and respect mean a lot to Arab peoples, and it is represented in all levels and areas of their lives from their greetings, through their official written communications and business priorities. This anecdote is a flamboyant image that depicts the obligations and needs for respect between two allied actors of history.

Nesóp and the Snake

„Told me by Amsba, wife of Salim al Muzaiyin, whilst in a camp at Arafjan on 1st April, 1933. It is mentioned here because of the resemblance it bears to one of Aesop's fables. The name Nesóp is significant.” (Dickson, 1949, 326.)

This animal fable is indeed showing many similarities to those of Aesop's (The farmer and the snake, The porcupine and the snake), this particular version has a very contrasting outcome.

One day Nesóp finds a snake frozen stiff on the ground, and he picks, it up and warms it up out of kindness. However, the snake does not want to leave his chest even after warming up. Nesóp turns

to the fox, Al Husni in desperation. The fox agrees to help, and when Nesóp appears with the snake, he tells the animal to come out of Nesóp's shirt and face him so that he can see the both of them. The snake follows through, and after listening to the request for Nesóp to leave, he proceeds to reason that he would not like to abandon a comfortable home; he has no reason to abide by the claim. Seeing there is no other solution, Nesóp beats the snake to death, which is a very different ending from what we have seen in both Aesop tales brought here as examples, as in both cases, the ones that welcome the snake die or get driven out of their own home. This Arab example is serving a different conclusion, showing the reader that however goodwill can put one in trouble, there is still a way out if the course of actions is changed, and one is not blinded by goodwill anymore. The fable here is not only the fable of goodwill and tricksters. This fable is about favours (and wasta), which is a commonly understood language through many local communities. If someone does a favour to anyone in the Arab world, it is advised and expected to be paid back in a similar way. *“Whoever has a favour done for him should repay it. If he cannot find anything he can use to repay it, he should praise the one who did it. When he praises him, he thanks him. If he is silent, he is ungrateful to him.”*; *“Whoever is treated well, let him repay them. If he cannot find repayment, let him praise them for that is thanking them.”* (al-Bukhari, 2006, Al-Adab Al-Mufrad, Book 10, Hadith 215.)

As it is Islamically important to show compassion, and kindness to others, remembering those who helped us, and helping them back is equally important, however, reminding them of the favour they received is not acceptable. Nesóp is stuck with the ungrateful snake's past kindness, and the snake is threatening to bite him. In his desperation, Nesóp turns to the fox, Husni, who agrees to help him out, so Nesóp offers him a rich reward in return for that, so Husni is not helping him out without the promise of the reward. In this case, the

fox is an intermediary *wasta*, who is trying to reach an agreement between the two parties without any success alone. The value of his action lies not in his mediation, but in his smart ways of tricking the snake into leaving the man's chest even for a short time, which is more than enough for Nesóp to take action and resolve the situation by himself, which is destroying the intruder, not giving it a chance to get back into his shirt. We do not know how Nesóp is paying back Al Husni for his kindness, but what is evident in the fable, is the snake's character. *Abu Tha'labah reported: The Messenger of Allah, peace and blessings be upon him, said, "The jinn have three forms: one form like dogs and snakes, one form flies through the air, and one form comes and goes."* (Hibbān, Ibn, Sahih Ibn Hibban, Hadith 6156)

In other words, the Jinns can take on different shapes, such as snakes. The Jinns are able to influence our senses, thinking, and decisions, they are able to avert us from God. They are, by default, invisible, but may take on different shapes. In this plot, the snake, therefore, is not only a dangerous animal that anyone who knows the desert is trying to avoid but also the archetype of evil, of danger. Blinded by goodwill, anyone may embrace evil temporarily, but there is a way out, even if the threat is so close to the heart. In classical Arabic and Persian literature, the fox is a symbol of craftiness and deceit as well as cowardice, and it often appears in different fables from the Middle East, from India to Greece. Not a surprise, therefore, that he appears as a crafty mediator who helps Nesóp to get a chance to get rid of the snake. It often happens in real life as well, that as long as community members are not able to solve a conflict, one of them, or both of them will turn to a mediator, a respected, and valued member of the society, who may advise them and offer alternate solutions, so that peace within the community may be maintained.

It may be a question, of why Nesóphad killed the snake. From an allegorical aspect, the snake is an

evil entity that used the man's goodwill to trick him, and now threatens his life every day, being adamant on stay, which will inevitably destroy the protagonist's life. There is no better way to get rid of evil, than destroying it. From a more pragmatic point of view, it is not forbidden by Islam to kill and slaughter animals for the purpose of food or if they pose a threat to people. Islam forbids only the senseless killing of animals for entertainment, sport, etc. In this case, the snake is the archetype of evil that is a threat to Nesóp and the community.

Ras al Dhíb: A Story with Moral

One day the lion (of the forest) is about to have a feast of its prey and invites the wolf and the fox. He asks them though how they would share the food. First, the wolf answers, giving his advice to the lion, on how the meat should be divided. The king of animals immediately dismembers the wolf, then turns to the fox for answers. The fox, being a timid and clever animal, answered that everything is the lion's property, everything is his. The lion, being satisfied with the reply, asks the fox where he gained his wisdom. To this, the fox points at the separated head of the wolf, and instead of waiting for further reactions, he runs off and disappears into the bushes.

This is a very simple narration of power dynamics, with an elementary explanation; there isn't a benefit in this world that is worth opposing, insulting or challenging power. Power is there to be abode by, and it is best to avoid it as long as one is willing to live. As opposed to the title, this narration is much more of a warning. Both lions and wolves might be representing ferocity in Islam. Lions are used as epithets before the names of heroes; the 'lion of God'. Turkish people often use 'my lion' instead of the name of the person, however, this article is not inclined to decipher Ottoman influence (cultural and linguistic) on the area in detail, even though it is fascinating contemporary

research. In Islamic (and other) arts, lions represent power and courage, and it's the attribute of rulers and warriors. The lion in this setting is the absolute owner of power. Very few resources mention wolves or offer any explanation of what they may symbolise. It may be a sufficient explanation, that in the desert, wolves usually represent a great and unnecessary risk or danger. It is better to avoid them, as one would wild dogs. The lion offers a feast to the wolf and the fox, not to provide, but to assess the response of the guests (as the riddles that the poor woodcutter has to solve, serve the purpose of assessing his capabilities and deciding if he is a cheater who represents a risk to authority).

The wolf is easily fooled by the question when the lion is wondering how he would divide the food between the three of them. Although the wolf is giving a seemingly humble answer, willing to give the best parts to the lion and share the rest between him and the fox, the lion still decides to kill him, and only the approval of the fox's answer (Everything is for the Lion) reveals why. Even though the wolf was asked a question, it was not a riddle of portions, it was the riddle of absolute submission. The wolf failed to submit to absolute authority when he gave his own opinion on what the lion should do, so the lion immediately destroyed him, perceiving the wolf as a threat, not a loyal follower. The lion did not expect an opinion or advice, the lion was expecting signs of unconditional submission, as it could be observed in the case of Captain Shakespeare. The fox is wiser, and fearing for his life, he is giving a wiser answer and submits to power. Eastern societies are generally considered masculine, hierarchical societal structures, where those on top of the hierarchy are rarely questioned, as opposed to for example the western cultures, where questioning power and authority is in general encouraged and accepted. In Arabic societies, questioning authority is usually considered a problematic behaviour that is discouraged by fellow members of the community.

Authority is usually paid due respect and loyalty, and its importance in local communities shall not be overlooked.

The Hattáb (woodcutter) and the Khaznah (treasure)

One day a poor woodcutter heard an imam preaching that if only a man had sufficient faith, he need do nothing, as all things will come to him. "*God will provide*", the woodcutter said, and against his wife's will and complaining, he stopped doing everything, waiting for God to provide him. One day two merchants going on a hunting expedition borrowed the woodcutter's donkey, and they paid good money for it. Before returning from their expedition, they stopped by a city and found a box full of treasures. Both of them started plotting against the other to put their hands on the money, but due to a fatal coincidence, they both managed to kill the other and they both died, so the donkey walked home with the treasure on its back. The woodcutter was very happy and understood that God indeed provides. The family got wealthy, and bought farms and animals, but lived modestly.

All went well, until the villagers started to talk, and the news of the woodcutter becoming wealthy reached the ears of the king, who naturally became curious, so he called the poor man for questioning. The woodcutter gave him the simple answer he knew, that he trusted God, so God provided, but the king did not want to believe this explanation, so he wanted to test the woodcutter. He gave him three riddles to answer by the next day, which he did with the help of his daughter, who appeared to be the "most clever of women". The answers were right, still, the king did not trust the man, so he decided to give him one more test, which the poor woodcutter completed again with the help of his daughter. However, the king was convinced that someone helped the woodcutter, and promised to let him go if he told the truth. The woodcutter

confessed everything, and the king, in his amusement, immediately asked for the daughter's hand in marriage. They got married, but the king decided to further test the daughter and gave her impossible tasks which she had to complete within a year, while he went on a hunting expedition. The girl completed the task using a clever disguise which fooled even the king himself. As a result, the king decided that the woman was worthy after all to be his queen and advisor.

What appears at first sight, is that this story is the longest of all that is narrated in Dickson's book. However, this was narrated to him as one plot, these are at least 3 separate plots of the same, clever-girl story types, and one about faith, where the protagonist reaches a higher social status through his actions (in this case inaction). In this case, the daughter does not solve only one riddle, she solves riddle after riddle, because the king refuses to believe that her father was able to solve such complicated questions, but finally, when the last puzzle is solved, the woodcutter tells the truth about everything, the king is inclined to marry the girl, which leads the reader to the next plot, that in itself can be an individual story.

As the king does not trust his new wife, he decides to leave on a hunting expedition even before consummating the marriage, leaving his newly-wed wife behind as a virgin. She is pleading with the king in vain, he not only leaves her behind but gives her a seemingly impossible task that can be solved only by means of trickery or miracle. „*Good wife, I leave my favourite mare with you. She has never had a horse put to her. Myself I shall take my stallion Al Krushan with me, but I have to ask for you to carry out in my absence. On my return I shall expect to see that my mare, Al Hamdani has had a foal by my stallion, Al Krushan, and I shall further expect you to have a child ready for me to see, whose father I shall be.*” (Dickson, 1949, 321.) and with that, the king leaves his wife to an eunuch. The young wife decides to trick her husband, and persuades her guard to buy her a

shaikh's clothing, as she wants to go after her husband, which in itself is an extraordinary decision. She was allowed to secretly leave the palace, on the condition that she returns in three weeks. She found the camp of the king, and disguised herself as a young shaikh, sending the message to the king that “he” wanted to pay him “his” respects. Her disguise was so clever, that the king was utterly convinced and deceived, and the young “shaikh” was so sympathetic to him, that he asked if the “shaikh” had any sisters he could marry. “He” answered that he indeed had a “twin sister” that could marry the king for a couple of days, but only secretly, as she was promised to a cousin.

It was also one of the conditions, that the sister must arrive and leave in complete disguise and secrecy. The king agreed, and the temporary marriage was arranged, the bride was covered in a burqa. After four days of “bliss”, the bride left, and the young shaikh returned. The king asked “him” how he could reward the shaikh for such a favour. He only asked to have “his” mare to be covered by Al Krushan, the king's black stallion and rejected all the money that was offered, as “he” already managed to steal the king's signet ring from his finger.

The wife of the king returned home and bore a child, the mare did too. The news was delivered to the king upon his return, who tried to strike his wife in blind rage not understanding what happened, as he thought he left his new wife with an impossible task. He questioned the woman, who asked him in return if he had done anything unfaithful or incorrect while he was away and showed him the signet ring.

The king was begging her to tell the truth, and after hearing it all, he approved that his wife is indeed worthy of the title of a queen. Looking at the entire plot, it is the story of changing social status, by faith and merits. From a structural and analytic viewpoint, the first section is the narrative of faith that is richly rewarding. It does not matter

what one's social status is, as long as they trust God, one will be led to their fate, and even though the sequence of events may seem like a coincidence, it is all the result of the trust in God. This first part of the story intends to establish the moral fundamentals of the characters. The man, who is the main character of the plot, is a God-fearing husband who would love to reach a higher financial status but does not have the tools and the means to do that.

When receiving the advice of the imam, a holy man, he does not let anyone divert him from his plan, not even his wife, who will constantly nag him to do the opposite. This is the story of the father, the husband, who is trying to create a better future for his family with the only thing he has; faith. So when he hears the advice to have faith and that God will provide and decides to follow through (literally) against all odds (he lays down at home, stops working, and does nothing for days, waiting for God to provide), he becomes rich. What is seen here, is not luck, but the reward of the God-fearing man, who deserves a better life because of his character. In other words, those with the correct morals and great character deserve and will strive by the will of God (even doing nothing) and will be able to change their social status.

The second plot of the riddles is an example of a clever-girl story, where the girl is getting into a higher social status marriage that she earns by her (God-given) finesse. The damsel is not only becoming the main character of the plot but is slowly but surely turning into the security of her family's future. However the father and the daughter are acting together throughout the plot, and the solution is all along with the daughter, the father becomes more of a spectator, although without the right moral compass, (the father of the family), the daughter would never have the capacity that is necessary to solve all the riddles. This plot is the preparation for the next one, where the actual

conflict is taking place. The second plot is a mere bridge, a preparatory section between plots one and three, that serves the purpose of reasoning why and how the king is becoming truly interested in the daughter of the poor man.

The assets (belief and luck) are accumulated and were proven to be sufficient to draw the (negative) attention of the character that is in this case representing power. In the next plot, it is clear though, that for true transformation, one's faith and luck are not enough, but true skills and merits are also needed.

Only these three components, true faith, divine providence, and bold merit will end in astounding results. The second plot closed with the daughter solving three riddles, which earns her a high-status marriage (and saves her father's head), changing social class and securing her family's future. The poor, powerless trust the higher power - God - that gains them a fortune. The change draws unwanted attention and the man is tested for his finesse and character, which his daughter helps him pass. No wonder, this unwanted attention from the king is a true question of life and death, as the king's riddles serve the purpose of understanding if the wood-cutter and his family are the people of finesse and merit or if they gained their fortune in questionable ways which would make him a threat to the king. If they fail, the family could lose everything, the father his head, the daughter and the wife all their property, and means of living, and societal approval. The daughter and her family's reward for their success though is acceptance in a higher social class, which is for the benefit of both actors. The king is gaining great support, security against threats, and maintaining good relations, while the girl and the family have their future secured socially and financially. In this sequence of events, having faith results in having money, having money results in having an opportunity, which is not entirely enough, one's merits are absolutely necessary for completing the story, while the opposition of

powerful-resourceful-born in and powerless-resourceless-merit-based achievements are slowly unveiled.

The third plot is the plot of catharsis and solution. It starts with a seemingly impossible task that the daughter, now queen flawlessly solves. The phenomenon of giving impossible tasks or riddles to women to prove that they are worthy wife is not at all uncommon in folktales. What makes it so fascinating is the particular context and environment the plot is placed in. Many interesting past (and surviving) habits of Arabs are described in this story. One of them is the custom of temporary marriage (which is considered 'haram' and unacceptable by the Sunni Muslims, but it's still widely practised by the Shia'.) *'Ali b. AbiTalib reported that the Messenger of Allah prohibited on the Day of Khaibar the contracting of temporary marriage with women and the eating of the flesh of domestic asses.* (Sahih Muslim 1407a, Sahih Muslim Book of Marriage Hadith 3263).

Temporary marriages are made for a certain amount of time, most of the time for money, and although entering into such an agreement is proving that the king is indeed also fallible, so within this context, the girl is not only setting up a clever trap for the king, fabricating a weapon as *Mut'ah*, (or temporary marriage) is forbidden, she also made sure that no laws are broken; Although she disguised herself, they have only consummated a marriage that was already valid, therefore neither the temporary marriage nor consummating it meant any threat to the king's reputation or her honour. In the same move, she solved the second task, of covering the king's mare with the stallion that the king had taken with him, which is the emphasis of the first task. „*Across the folklore of virtually all cultures, the figure of the trickster stands out as a convergence of deception, disguise, and verbal ambiguity.*” (Slyomovics, 1999, 55).

The line between the figure of the trickster and figures that are utilising tools of deception for a

legit purpose or to restore order in their lives is very fine. In this case however, although we are talking about trickery and disguise, no laws - other than cross-dressing - have been violated by the young woman, and her motifs were honest, she was faced with an impossible task that could be solved only by the use of equally twisted means. The main character remained true to her father's faith which gained her family the opportunity to thrive, she has always continued to be lawful, and the king, in the end, was awed by her crafty tricks. The solution to the conflict is when the king finally breaks down and accepts the fact that the family gained their wealth through faith and merits, and therefore he truly accepts his wife in his court. The family went through three stages, and for the solution of each, different characteristics were necessary. The first phase needed true faith. The second one needed intellect, and the third one needed the combination of intellect, disguise, and trickery, which resulted in acceptance, and approval.

In this story of three plots, the clever girl has solved many complex tasks, proving her capacity and worthiness of being the wife of a king, and a queen. Within the given context, the girl must prove that she is able to outsmart the king. From the riddles through tasks, this plot, other than the king's search for proof of the family's true character, is the competition of minds and tricks at an overwhelming measure and intensity. It is thus a logical assumption that the criteria for rising from being a commoner to a queen are exhibiting extraordinary traits and behaviours, which in this case is deception and/or disguise, which is a returning motive in world and Arabic literature. Disguise used to be life-saving for the Arab tribes of the desert centuries ago. We do not need to look back in history that long though, it is enough to bring up Gyula Germanus' travel to Mecca in the early 1930-s (Mestyán, 2017). A king is an extraordinary man, who needs an extraordinary wife, as a

support, as his advisor, capable of developing solutions to complex problems alone.

Briefly, the described sequence of plots is entwined into a fantastically complex and lengthy narrative in the book of Dickson, which provided a glimpse into everyday life and the rules of it of everyday folks. From the stories, some obvious aspects of power dynamics within the wider Arabic and Kuwaiti society are revealed, and we can gain some understanding of the significance of their marriage system and social status. The story of the amorous fidawi is an example of the absolute role of morals, Ras al Dhīb is the story of power, Nesóp is teaching us about the limits of goodwill, and Captain Shakespeare provides a valuable lesson about respect. All of these narrations hold invaluable moral for the local community whether they keep their stories alive. As the tales that are kept alive through oral traditions are so scarce in the geographic area, and because they are given so little importance since the invasion, it is important to “dig up” as many of these stories as possible. The old generation, as the young (interviewed) Kuwaitis referred to them, still remember these. Also, it is important to translate the books that were published only in Arabic, to let the wider audience peek into this incredible heritage Kuwaiti stories have in store for us. The above narrations are certainly only a fragment of a country’s extremely rich heritage, which this article attempted to explain and reveal to the reader.

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**SAYAW NG BATI:
A PERSPECTIVE ON TRANSCULTURATION OF THE SPANISH COLONIAL HERITAGE
IN THE SOUTHERN TAGALOG REGION OF THE PHILIPPINES**

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Abstract

Just like other dances that developed during the Christianization of the Philippines, the *Sayaw ng Bati* (Dance of Greeting), a dance performance conducted during the dawn of Easter Sunday in the Southern Tagalog Region, is a byproduct of transculturation, a process where the subordinate culture (the colonized) selects certain cultural items in the dominant culture (the colonizer) that fits their contexts and preferences. This paper then aims to elucidate how transculturation occurred in the Philippines that dramatically altered the precolonial heritage of the Filipino people during the Spanish colonization of the country. Using a variety of sources from reputable Filipino scholars in the field of cultural anthropology and dance, the precolonial and Spanish colonial experiences were reviewed and contrasted to understand how transculturation happened in Philippine society and to look for parallels between the two historical contexts, which also affected how dance forms imported from Europe were perceived and developed through the ingenuity of Filipinos during the colonization of the archipelago.

Keywords: Sayaw ng Bati, precolonial Philippines, Spanish colonization, Philippine dances, transculturation

Diszcipline: cultural antropology

Absztrakt:

SAYAW NG BATI: A SPANYOL GYARMATI ÖRÖKSÉG TRANZKULTURÁCIÓJÁNAK PERSPEKTÍVÁJA A FÜLÖP-SZIGETEK DÉLI TAGALOG RÉGIÓJÁBAN

A Fülöp-szigetek keresztényesítése során kialakult más táncokhoz hasonlóan a *Sayaw ng Bati* (Üdvözlő tánc) – mely a déli tagalog régióban jellemző húsvétvasárnap hajnalán bemutatott táncelőadás - is a transzkulturalizáció mellékterméke, mely egy olyan folyamat, amely során az alárendelt (gyarmatosított) kultúra kiválasztja a domináns (gyarmatosító) kultúra azon kulturális elemeit, amelyek megfelelnek az ő kontextusuknak és preferenciáiknak. A tanulmány célja, annak megvilágítása, hogy a Fülöp-szigeteken hogyan zajlott le a transzkulturalizáció jelensége, s rámutasson arra, hogy a sziget őslakosainak (a filippínóknak) nemzeti öröksége hogyan változott a spanyol gyarmatosítás következtében. A kvalitatív kutatómódszertani technikákra támaszkodó elemzés a kulturális antropológia és a tánc területén elismert filippínó tudósoktól származó különböző források felhasználásával tekintette át és állította szembe a prekoloniális és a spanyol gyarmati tapasztalatokat, annak érdekében, hogy megértsék, hogy hogyan történt a transzkulturáció a filippínó társadalomban, és párhuzamokat keressenek a két történelmi kontextus között, ami szintén befolyásolta, hogy az Európából importált táncformákat hogyan érzékelték és fejlesztették tovább a szigetvilág gyarmatosítása során.

Kulcsszavak: *Sayaw ng Bati*, Fülöp-szigetek, Spanyol gyarmatosítás, Fülöp-szigeteki táncok, transzkulturáció

Diszciplína: kulturális antropológia

Sayaw ng Bati: A perspective on transculturation of the Spanish colonial heritage in the Southern Tagalog Region of the Philippines

It was in the later years of my college days between 2009 and 2010 when I discovered a unique Easter dance ritual through a casual search on YouTube. I found this dance ritual interesting because, while every Catholic parish in the Philippines conducts the *Salubong* (a ritual on the dawn of Easter Sunday where the image of the Resurrected Christ meets the image of the Blessed Virgin Mary after the procession), the performance of the *Sayaw ng Bati* (Dance of Greeting) as part of the Easter liturgy is unheard of except in the Southern Tagalog Region. In this study, I will be using the term *bati* to refer to the said dance for the sake of efficiency. The performance of the *bati* that I watched on YouTube back then was an annual tradition in Ibaan, Batangas where the dance ritual is customarily performed by a *kapitana* (a lady) and two gentlemen. The *kapitana* in her frilly white

costume complete with a straw hat held a white flag or *bandera*, while the gentlemen wore fine Barong Tagalog (a traditional embroidered shirt for men normally made of pineapple, *jusi* or cocoon fiber) and black trousers. Together, the three dancers performed the *bati* in the plaza adjacent to the church. The dance routine is a mixture of intricate footwork and marching where the emphasis is geared towards the *kapitana* who waves the flag in various postures throughout the performance, which lasted for ten minutes. This performance is accompanied by the tune and tempo of the local brass band.

After this brief encounter with the *bati* tradition, it developed a keen sense of interest on my part to watch the succeeding performances every year via social media. It was also on YouTube where I discovered that variations of the *bati* existed in many localities in the Southern Tagalog Region, which is composed of the following provinces: Batangas, Laguna, Cavite, Marinduque, Occidental Mindoro, Oriental Mindoro, Palawan, Quezon,

Rizal, Romblon, Aurora and Lucena (Philippine Statistics Authority, 2003). Despite many towns practicing the *bati*, the most prominent varieties, upon closer inspection, could be found in Angono, Rizal and Ibaan, Batangas. It is also practiced in Parañaque, a city located in the National Capital Region, which was once under the province of Rizal (Historical Milestone, n.d.; Alas, 2021). In the Encyclopedia of Philippine Art, an authoritative source in Philippine art forms by the Cultural Center of the Philippines, the documentation of the *bati* is anchored on the tradition in Angono, Rizal (Matilac, 2018), whereas, based on my initial perception, formal written documentation is lacking on the *bati* tradition in Ibaan and Parañaque except for a few written excerpts and annotations on Facebook (Parañaque City Public Library, 2019; Sinsay Ibaan, 2021) and probably through published souvenir programs. In contrast, what lacks in written documentation is salvaged by the amount of video recordings uploaded on social media, particularly on YouTube. These reasons implored me to focus this study on the *bati* rituals of Ibaan, Angono, and Parañaque. As I have become engrossed with the *bati* tradition, I made it a point to look for some written extracts that would lead me to understand the root of the said ritual. If it is practiced in many towns in the Southern Tagalog Region, then it must be significant to the culture of those people. There must be a common ground why majority of these towns and their people preserved the dance ritual. In one of the articles I extracted, it proposes that the *bati* (or *bate*) was Christianized during the Spanish occupation of the Philippines (Villaruz, n.d.) just like many indigenous practices of pre-Hispanic Filipinos. However, I never encountered a single source that documented the *bati* in its purest form – the way ancient Filipinos practiced it. Without any validation or proper documentation, I suppose that such belief is merely a proposal worthy of further exploration. I also raised this concern to Bryan

Viray, a scholar specializing in Filipino dances from the University of the Philippines who wrote an important article entitled “Greeting the Virgin Mary: The Dancerly Attitudes of the *Bati* in *Salubong*” published in 2019, which compared the *bati* tradition between Boac, Marinduque and Angono, Rizal. Through email correspondence, he pointed that although the *bati* is a common practice, finding an indigenous dance parallel to it is challenging.

Out of the three *bati* variations I mentioned earlier, it is only in Ibaan, Batangas where the routine is performed by a female and two male dancers. If the *bati* in Ibaan stemmed from a pre-Hispanic tradition, could it be linked to the dance *saraw* or *sa araw* (to or for the sun)? *Saraw* is an ancient dance tradition of *Batangueños* (natives of Batangas) that relates to sun worship where couples performed the custom (Acuña et al., 2018). This dance tradition, unfortunately, is now extinct and to find connections between *saraw* and the *bati* seem to pose great difficulty. Therefore, as an ethnographer and anthropologist, I argue that to understand holistically the *bati* and the people who practice them, we need to scratch the surface of the custom by contextualizing it through the pre-colonial society, religion and dances of early Filipinos, the political changes that occurred during the arrival of the Spanish colonizers, the imposition of Christianity to native society as part of the colonial agenda, and the dances introduced, transformed and inspired by the Christianization of the Filipino people. These facets will foster a deeper understanding of the *bati* rituals and their significance to the identity and culture of those places where the *bati* is performed.

Pre-Hispanic society in the Philippines Government and politics

Historical narratives regarding pre-Hispanic society in the Philippines are comparable to solving a puzzle. Majority of what we know today are largely based on the observations of Spaniards,

especially the missionaries, who evangelized various provinces in the country between the 16th and 17th century. If not, we turn to archeology to get our information from ancient relics that were excavated through the years. Archeological evidence suggests that human presence in the country was already present 22,000 years ago and traces of Indian, Chinese and Islamic influences were clearly notable (Jocano, 1998; Agoncillo, 1990). Pre-Hispanic society in the Philippines, just like its neighboring countries in Southeast Asia, practiced tribalism (Reyes, 2015). As an archipelago composed of three major island groups – Luzon, Visayas and Mindanao, there was no centralized government. Authority to govern rested on local leaders, the *datu*, who ruled thirty to one hundred families. These families represented the so-called *barangay* (a village or neighborhood). The term is derived from an earlier word *balangay*, which was a boat used by sea-faring natives who conducted trade in various islands and eventually settled in the Philippines. In the *barangay*, the *datu* led based on blood and kinship relations and he also forged alliances with other *datu*s to safeguard peace (Scott, 1994). He was also considered as the chief executive, legislator, judge, and military commander (NSO 2010 Philippine Yearbook, 2010). Aside from the *datu*, the *barangay* of ancient Philippines was generally organized through the presence of these essential leaders: the *babaylan* (priestess), the *panday* (blacksmith) and the *bayani* (warrior) (Salazar, 1989). While the *datu* served as the leader of each community, he consulted these important figures on matters pertaining to worship, agriculture, governance, and warfare. The *babaylan*, which will be discussed extensively later, is also known as *catalona* among the Tagalogs of Luzon. Since the *babaylan* was knowledgeable in astronomy, the *datu* considered the *babaylan*'s recommendations when to clear the forest for the planting season and the right time to harvest crops (Villariba, 1996). The *panday*, meanwhile, means “ironsmith” in Tagalog

(Velasco, 1997). The *panday* was important in pre-colonial society because he knew how to craft weapons that were essential in warfare. As a master in metallurgy, he combined mysticism and spirituality together with astrology in the practice of crafting weapons (e.g., *keris*, *kampilan*) to the point that these may take a long time to be finished (Mallari, 2009). Scott (1994) adds that the term may also refer to any craftsmen such as goldsmiths, carpenters and boat builders, who were highly respected in pre-colonial society. In contrast, the *bayani* is defined by the *Vocabulario de la Lengua Tagala* (Vocabulary of the Tagalogs), compiled by Jesuit missionaries Juan de Noceda and Pedro de Sanlucar and published in 1754, as “someone who is brave or valiant” and “someone who works toward a common task or cooperative endeavor” (as cited in Ocampo, 2016). Thus, in the context of pre-colonial society, these were men who assisted and fought valiantly with the *datu* during warfare. The body of a warrior was decorated with tattoos, which was a rite of passage. These also depicted his bravery and social standing in the community. The Boxer Codex, a manuscript written in 1590, shows the significance of tattoos, especially among Visayan warriors called the *Pintados*, where each tattoo represented the warrior's social standing and valor (Ocampo, n.d., as cited in Baclig, 2020). For the ethnic groups in the uplands of Luzon (e.g., Bontoc, Ifugao, Kalinga), the number of tattoos on a warrior's body was parallel to the number of enemies they killed in battles (Baclig, 2020).

Domestic life and social hierarchies

Domestic life in the precolonial period is still reflected in present day Philippine society. Just like contemporary Filipinos, our ancestors maintained a close relationship with their families, which was the basic unit in the community. It was expected for children to show obedience and filial piety to their parents and accord respect to their elders. Often, parents set arranged marriages for their children.

The prospective groom was expected to give dowry called *bigay-kaya* or it could be in the form of land. In addition, *pamamanhikan* was also practiced where the groom would render service to the bride's household (NSO 2010 Philippine Yearbook, 2010). As a matriarchal society, women were highly respected. They could inherit land, own assets, serve as religious leaders in the community, and participate in combat (Mathkar, 2019).

Precolonial society had four social classes. The highest of which was the chiefs or the *datu*. If the *datu* had power and control large areas other than his *barangay*, he was given the title *Lakan* or *Rajah*, which originated from a Hindu word. Next to the *datu* was the nobility called *maharlika* from the ancient Sanskrit word "*maharddhika*," which means "a man of wealth, knowledge or ability." The *maharlika* was required to serve the *datu*, especially during warfare. If a *maharlika* wanted to leave the *datu's* service, he was required to conduct two things: host a huge public feast and pay the *datu* a total of 6 to 18 pesos worth of gold. The freemen known as *timawa* were free commoners. They could accumulate properties and they were not required to pay tributes to the *datu*. At certain times, they were required to render services to the *datu's* land and other community projects. They were, however, free to change allegiance from one *datu* to the next if they marry someone from another town or transfer to a new area.

The lowest class in precolonial society was the *alipin* or slaves, but it is quite different in the Western connotation of the word. An *alipin* was someone who had incurred debts. One could become an *alipin* either by birth as debts of parents could be inherited or when payment obligations was transferred from one master to the next, although freedom was possible if an *alipin* purchased such right. In precolonial society, there were two types of *alipin*: *aliping namamahay* and *aliping sagigilid*.

The *aliping namamahay* was not technically a slave as he was given a parcel of land by his master; in return, he had to offer tributes and work on the land of his master as needed. On the contrary, the *aliping sagigilid* was totally dependent on his master for food and lodging. They worked "behind and below the house."

The *aliping sagigilid* may attain the status of the *namamahay* or *timawa* by purchasing such title to his master (Morrow, 2009).

Religion and culture

Anthropologists and archeologists agree that precolonial Filipinos practiced animism (Reyes, 2015; Reyes, 1985; Macaranas, 2021). The term was first coined by Edward Burnett Tylor (1871). Tylor also listed the attributes or characteristics of animistic beliefs: "An idea of pervading life and will in nature far outside modern limits, a belief in personal souls animating even what we call inanimate bodies, a theory of transmigration of souls as well in life as after death, a sense of crowds of spiritual beings, sometimes flitting through the air, but sometimes also inhabiting trees and rocks and waterfalls, and so lending their own personality to such material objects" (Tylor, 1971, as cited in Reyes, 2015). In the words of Barfield (1988), "original participation" is inherent in the practice because, in the animist worldview, there is no separation between oneself and the world of phenomena – everything has supernatural interconnectedness.

The natives of precolonial Philippines believed in a supreme being called *Bathala* or *Maykapal* who created both man and the world. Reyes (1985) postulates that such monotheistic belief was probably influenced by Islam, which was brought to the Philippines by Malay traders even before the arrival of the Spaniards in 1521. For the natives, this god was unreachable, so sacrifices were not conducted, temples were not erected, and

organized religion was not established. Instead, rituals were a way of life and these were presided anywhere (e.g., rivers, mountains, fields, home) because the natives believed that all things in nature had souls and spirits (Reyes, 1985; Reyes, 2015). This is also the reason why early Filipinos believed in *dimata* (gods or goddesses), *engkanto* (nature spirit), *dumende* (dwarf), among others. Our ancestors believed that these supernatural beings dwell in nature. If pestilence, drought, famine, severe illness or even good harvest occurred, these were attributed to the power and potency of the said creatures and rituals were conducted either to appease or celebrate them.

The *babaylan* or *catalona* (priestess) was the primary figure who led the conduct of the rituals. Normally, they were women, but men could also serve as *babaylan*. One type of ritual that a *babaylan* conducted was a *manganito*, an act of honoring *Bathala*. After a communal meal, the *babaylan* chanted prayers while the natives offered food and wine to the *anito*, a totem representing an ancestor (Blair & Robertson, 1903). Although they were seen as mediators between men and the spirit world, they were highly respected because precolonial society regarded them as gatekeepers of local culture for they mastered not only religious rites, but poetry, oral traditions, songs, dances and even medicine (Reyes, 2015; Tamayo, 2022). Given that temples were not extant then for religious rituals, the *datu's* house served as the venue where the *babaylan* and the local community conducted certain rites (Tamayo, 2022). Ancestor worship was also practiced by the natives using the *anito* or *likha* for the Tagalogs. These statues were made through a variety of materials such as stone, bone, tooth of an animal, gold (Barrows, 2016). However, the most popular material was wood. In the uplands of Luzon, they call the *anito* as *bulol*, which represented either a nature deity, a granary god, or an ancestor. The ethnic groups in the Cordilleras used them in pairs as an iconography of fertility,

whereas those in Kiangán, Ifugao used the *bulol* separately (Tamayo, 2020). Filipino philosopher Ramon Reyes (1985) clarifies that one should view ancestor worship in Philippine precolonial society carefully. It is not merely worshipping one's ancestors, but it is a form of recollection or the "recitation of one's genealogy." For the natives, the past, present and future were one and the same; as such, human existence was viewed as "one sacred ritual of repetition, commemorating and reliving the sacred original past from which man and all things have come and from which, in truth, they have never left."

Archeological findings also proved that our ancestors believed in the concept of the afterlife. The Manunggul Jar, which was dated between 890 and 710 BC (late Neolithic Period), was excavated at the Tabon Caves in Palawan (Ronquillo, 2003). The jar was used as an ossuary and, above it, two men were seated on the boat of the dead. Both figures wore a band surrounding the face that secured the jaw, which was a common burial practice that still survives to this day among indigenous communities. The figure in front of the boat folds his hands across the chest, a typical method in arranging a corpse, whereas the figure at the back steers the boat (Chua, n.d.). According to Filipino historian Michael Charleston Chua (n.d.), numerous epics in the Philippines narrated how one's *kaluluma* (soul) is transported to the afterlife via boats that pass-through bodies of water. This *kaluluma*, for our ancestors, would return to earth after death, live in nature, and eventually guide their descendants. He adds that the Manunggul Jar has three faces – "the soul, the boat driver, and the boat itself" – and it implies an important facet in the natives' worldview: all things in nature have souls and lives.

Precolonial dances

Even before the arrival of the Spaniards to the Philippines, the country was already populated by

Indigenous Peoples (IP), who belonged to 110 ethno-linguistic groups. Majority of whom were residing in Northern Luzon (Cordillera Administrative Region, 33%) and Mindanao (61%) (United Nations Development Programme – Philippines, 2013). It is no wonder then that various ethno-linguistic groups had a fair share of traditional dances older than the Philippines. Dancing had been used by our ancestors to appease or gain favor from gods and spirits, celebrate a good harvest, imitate animals or other life forms, narrate their stories, conduct rituals, observe rite of passage, and recollect their local legends and histories (Crawford, n.d.). One significant characteristic of precolonial dances, even those that developed during the Spanish colonization, is the use of iconography and props to portray meaning in a dance. For example, to portray occupation and livelihood, some dances use local crops to accompany the dance routine.

In the ritual dance called *pagdivata* of the Tagbanua in Palawan, the *babaylan* use an *anabaw* as a *palaspas* (frond) to celebrate the harvest season (Buot, 2012). The ritual dance is conducted in the evening where the *babaylan* goes on a series of trances around an altar called *pagbuysan* containing a heap of rice at the middle to summon the spirits of relatives and ancestors as well as *Maguindusa*, the supreme being in the Tagbanua culture. The *pagbuysan* is also surrounded by various items (e.g., betel nuts, red cloth, candles, sweets, rice cakes in young bamboo stem, cigarettes, chicken). Accordingly, there is a belief that the *tabad* (rice wine) to be used in the ritual must be prepared in a particular manner or *Maguindusa* will not grace the community (Acero, 2020).

Bamboo is also a typical material represented in several precolonial dances. Aside from the fact that it serves multiple uses (i.e., construction material, mats, food, utensil), bamboo is well represented in Philippine folklore (Buot, 2012). The Tagalog's story of the creation dwells on the bamboo where a

hawk furiously pecked at it. Eventually, a section of the bamboo birthed a man and from another a woman (Cole, 1916). From this example, we can also deduce the significance of the bamboo in pre-colonial dances such as the *Tinikling* and *Singkil*. The *Tinikling* dance is a precolonial occupational and mimicry dance which originated in the island of Leyte. The dance routine exemplifies the attempts of farmers to catch the *Tinikling*, a bird (Slaty-breasted Rail) that is highly notorious among farmers as it feeds on rice grains (Villapando, 1986, as cited in Buot, 2012). Using two parallel bamboo poles controlled by clappers who hold and hit the poles at the same time, the couple or individual involved in the dance routine paces moderately to very fast as they continuously hop and leap between the poles (Buot, 2012). Our ancestors usually conducted this dance as a form of entertainment, so getting caught between the poles may result to laughter among the gathered crowd (Aquino, 1976). While this dance may be entertaining, it nonetheless depicted not only the Filipinos' sense of physical survival, but also of their emotional and psychological being (Buot, 2012).

In Mindanao, another notable dance that has precolonial roots is the *Singkil*. Just like the *Tinikling*, it maximizes the use of bamboo poles throughout the dance routine. In contrast, the *Singkil* is an indigenous dance of the Maranao and the Maguindanao people. Aside from the use of the iconic bamboo poles, it is a performance that narrates the Darangen, an epic inspired by the Ramayana, that has Hindu, Malay, and Islamic influences. In 2005, the UNESCO recognized the Darangen as a “masterpiece of the oral and intangible heritage of humanity.” The epic as in the dance portrays the abduction of Princess Gandingan, who was rescued by Prince Bantugan from a supernatural creature (Panaraag & Inte, 2015).

The *Singkil* shows us the rich cultural heritage of the Maranao and the Maguindanao people through the elaborate costume of the dancers and distinct

paraphernalia (i.e., sword, shield, bamboo poles, parasols, fans, handkerchief). In the dance, the female and male lead, as well as the other dancers, step elegantly on the rhythmically striking bamboo poles. The *Singkil* is accompanied by the music produced by the *kotiyapi* (a set of musical instruments) that includes a bamboo guitar, bamboo flute, harp, and metal sticks (Tomar, 2018).

Philippine society during the Spanish colonization

Government and politics

The expedition of Portuguese explorer Ferdinand Magellan under the Spanish sovereign prompted the first contact between early Filipinos and the Spaniards. Instead of the Spice Islands in Indonesia, the fleet of Magellan reached the Philippines in 1521 where he conducted blood compact with various chieftains. In Cebu, he forged alliances with Rajah Humabon who had been hostile with another chieftain, Lapu-Lapu. Believing that he could conquer Lapu-Lapu's territory through the might of Spanish cannons and artillery, Magellan vowed for victory in the Battle of Mactan. His drastic actions, consequently, led to his untimely death. Magellan was shot by a poisoned arrow during the skirmish on 27 April 1521 (Pigaffeta, 1969; National Geographic Society, 2022). From the death of Magellan, it took another forty-four years before the Philippines was formally colonized by Spain in 1565 under the command of Miguel Lopez de Legazpi. Luis de Velasco, the viceroy of New Spain, instructed Legazpi to claim the Philippines for the sovereign, so he sailed from Acapulco, Mexico to the Philippines with five ships at his disposal. Legazpi established the first Spanish settlement in Cebu and, in 1570, after sending an expedition in Luzon and pacifying the conflict with Rajah Soliman, he founded the City of Manila. It

was also elevated to the status of a capital and Spain's primary trading port (Britannica, n.d.).

Governance of the Philippines during the colonization was highly modeled after the Spanish territories in Latin America. The Council of the Indies was an institution that drafted and passed all the laws for all Spanish colonies to adhere. In the same vein, the creation of the Supreme Court and municipal government in the Philippines was guided by the codes of the council. Until the early 19th century, the Philippines was administered by Spain through the viceroy of Mexico. This became controversial because the king of Spain failed to rule the Philippines directly. Even if the king had good intentions for the colony, it would never be felt because his subordinates or representatives in the islands had an agenda of their own (Bernard, 1904). Documents from Mexican sources point that Spain decided to retain the Philippines as its colony for "economic and strategic reasons." As the Philippines is surrounded by China, Japan and the Spice Islands, it was a strategic location to conduct trade that would eventually finance the Spanish empire through the colonial income called *situado* (Stošić, Marcović, & Smith, 2016).

Domestic life and social hierarchies

Domestic life in the Philippines before the conquest of Spain revolved around the *barangay*, which was administered by the local chieftain or *datu*. Peace and order were maintained through kinship relations and treaties with other chieftains. As such, there was no central power that governed the Philippine archipelago. This posed both as an advantage and disadvantage for the Spaniards. Compared to their experience in New Spain, there was no need to impose massive military conquest and they were able to requisition the lowlanders in a shorter span of time. However, for centralization to happen, they had to subdue one *barangay* to the next or one island to another island. In the early stages of the Spanish colonization of the

Philippines, the *encomienda* system was used as an instrument to govern the population. Those subjugated *barangays* that were closer to each other by proximity were fused together and this eventually formed an *encomienda*. Under the *encomienda*, vast tracks of land were granted by the sovereign to colonial officials and the religious orders (e.g., Dominicans, Augustinians, Franciscans, Jesuits) who were called *encomenderos*. In return, they were required to protect the people and to teach them the Catholic faith (Stošić, Marcović, & Smith, 2016).

The most important contribution of the *encomienda*, perhaps, was the establishment of the *pueblos* which forced the population living in scattered settlements to organize themselves in larger communities in the process called *reduccion* (Stošić, Marcović, & Smith, 2016). Historian Tamar Herzog (2018) highlights that the *reduccion* was an important policy of the colonial government because those who lived outside the *reducciones* were branded as dangerous and hostile. In fact, those who resided outside the *reducciones* were coined as *cimarrones* (untamed), *vagabundos* (vagrants) or *remontados* (people of the hills) (Gutay, n.d.).

Despite these stereotypes, many natives were hesitant to transfer to the *pueblos* because the majority were subsistence farmers or fishermen. This problem was solved by having the *visitacion* system where a small chapel (*visita*) was erected in distinct places outside the *reduccion*. The parish priest from the *población* (town proper) would visit these chapels at least once a month to administer the sacraments or conduct civil duties (Coseteng, 1972). Later, the *encomienda* had become an abusive system given that many *encomenderos* wielded so much power that they undermined authority. The Spanish king eventually limited the allocation of *encomiendas* and the power of the *encomenderos*. Instead, he appointed colonial officials and friars to govern the *pueblos* (Stošić, Marcović, & Smith, 2016).

The existing class structure during the precolonial period dissolved and changed during the Spanish colonial period. In general, the church became the central figure that administered the *pueblo* through the parish priest. Every decision whether it be civil, political, or religious was decided by the parish priest. Second to the parish priest was the *gobernadorcillo* or the chief magistrate. More so, the *datu's* position as the leading figure head of the precolonial days was changed to the position of a *cabeza de barangay*. This position was also hereditary. In the colonial days, the *datu* and his immediate family became the *principalia* (upper-class) and all civil positions available for the natives then were taken from this class.

Although the power of the *cabeza* or *gobernadorcillo* was heavily reduced by the authority of the parish priest and other Spanish officials, his opposition to their rule may be emphasized through this statement “I obey but do not execute” (Stošić, Marcović, & Smith, 2016). By the 19th century, another class of people developed – the *ilustrados*. Given the opening of the Suez Canal in 1869 and the booming agricultural export economy, the *ilustrados* were offspring of middle- and upper-class families who were able to secure an education in Europe (Hernandez, 2015). These individuals helped enlightening Philippine society, particularly in the areas of art and architecture as well as social and political reforms, by bringing contemporary European ideas in the country at the time.

Similar to the precolonial experience, the role of women in the Spanish colonial period was significant more than ever. Bernard Moses (1904), an American political scientist, put emphasis on the role of women in Philippine society during the Spanish regime: “In the Philippines, woman is neither a useless ornament nor a beast of burden, but a rational being standing by her husband and contributing her part in the struggle for existence.”

Women in the archipelago during the Spanish colonial period can be pictured into three contexts.

Those who would like to become teachers were attending the normal schools and, later, they would help in maintaining the public schools. There were also those who were admired for their business acumen. Many of them were engaged in trading, particularly agricultural products. In addition, it was also common for women to be highly engaged in the church and other religious exercises (Bernard, 1904). These realities were seen as a deviation from the traditional concepts of womanhood in Oriental societies at the time.

Catholicism and colonial culture

Animism was deeply embedded in the psyche and identity of precolonial Filipinos. The belief in various spirits residing in nature led to feasting or offering sacrifices either to appease them or bring good harvest. Deep down this spiritual belief, totemism was practiced by the natives. The totem is any sacred object, a symbol or an emblem for a group of people, which functions as a reminder of the group's ancestry or mythical past (Goswami, 2018). For social scientist Henry Jones Ford (1904), it deals with the primitive concept of a family pedigree. Totemism was and still is practiced by the ethnic groups located in the uplands of Northern Luzon, particularly in Ifugao and the Cordilleras. The local totem is known in the vernacular as the *bulol*, which may be related to a granary god, an ancestor, or as a symbol of fertility. For the Tagalogs, they call their totem as the *larawan* (Tamayo, 2020). When conquistador Ferdinand Magellan arrived in the Philippines in 1521, a mass baptism was held and this included Rajah Humabon and his wife, who was given the Christian name Juana. Humabon's wife saw an image of the *Santo Niño* (Holy Child), which probably came from Flanders, and an image of the Madonna. Given that these statues were alike the idols that the natives worshipped, these reduced her to tears and implored the Spanish

conquistadors to give her the images, which they did (Pigafetta, 1969).

When Miguel Lopez de Legazpi arrived in Cebu decades later, he ordered the burning of some villages after a misunderstanding that erupted between him and the local chieftain, Rajah Tupas, who ordered Legazpi to pay *dinuggoan* (wharfage dues) to which he declined (Oaminal, 2018). In one of the large houses, they found the image of the *Santo Niño* residing inside a box made of pinewood wherein it was surrounded by dozens of flowers (Bautista, 2010; Del Castillo, 2015). In the intervening years between Magellan and Legazpi, a cult to the *Santo Niño* developed that made it popular not only in Cebu, but also in nearby islands. For three centuries of Spanish rule in the Philippines, the most successful mission was the Christianization of the native population. Even after they left the colony, Catholicism remains the stronghold of the Spaniards. The religious orders that came with Legazpi and those that came in succession even learned local languages to catechize early Filipinos. Their power was also sanctioned by Rome through the *Patronato Real*, which was made through the papal bull *Universalis ecclesiae*. This granted Ferdinand, the Spanish monarch, and the religious orders to erect churches in all Spanish colonies and to nominate candidates for colonial bishoprics and other ecclesiastical offices (Lee, 1971). More so, little to no resistance was experienced by the friars in indoctrinating the new faith. The natives probably saw certain parallelisms between their old spirituality and the Catholic faith. While their idols were burned, these were replaced with Catholic iconography, the *santo* (images of saints), which remains an important symbol in the religious and cultural life of modern Filipinos (Tamayo, 2020). Since the natives were ritualistic and had fondness for pageantry, ornate rituals and lavish churches were used as propaganda by the friars to attract and convert the people. The most anticipated activity in the *pueblos* was the town

fiesta, which centered on the patron saint. For ten days, elaborate novenas, mesmerizing processions, stage plays, festive music, and excessive feasting were observed to the delight of the townsfolk (Tamayo, 2022).

Perhaps, the most controversial aspect of Christianization in the Philippines was the eradication of the *babaylans* and their position in local society. The friars saw them as a threat that needed to be subdued. They smashed and burned the idols used in rituals and even asked young boys to defecate on the said images (Amoroso & Abinales, 2005). In the early phase of Christianization of the islands, the friars focused on the conversion of the *babaylans*. From being a spiritual leader, keeper of ancient traditions, folklore, and master of local medicine, the role of the *babaylan* in the Spanish colonial Philippines was reduced to assisting the parish priest during the mass and organizing the religious processions (Salazar, 1989). For some, they resumed their healing practices, but used Christian iconography to avoid the wrath of the friars. Others went to reclusion in the mountains because they were branded as witches or *mangkukulam* (Limos, 2019).

Outside the *reduccion*, something novel happened: indigenous customs morphed with Christian teachings, which then developed to what Filipino anthropologists coined as folk Catholicism (Jocano, 1967; Macaranas, 2021). Unlike the *pueblos*, those residing in the *barrios* of rural areas far from the parish church did not attain the full benefits of catechism as they were seldom visited by the friars. These communities were able to preserve many precolonial beliefs that became resilient and hid under the guise of Christianity. Take for example the Filipino virtue of *pakikisama* (to be with) being reflected in the controversial tradition of crucifixion and self-flagellation during Holy Week. In the lowlands of Luzon, some natives, especially the males, volunteer to be crucified or flagellate themselves in broad day light as an act of

pakikisama with the sacrifices of Jesus Christ. Many do this willingly because of *panata* (vow) brought upon either by an answered prayer or special intention and, at times, this *panata* could be inherited as well by one generation to the next. Although the practice of crucifixion or flagellation is heavily renounced by the Catholic church, it persists to this day. The macho culture attached to these practices also contributed to its survival.

Dances during the Spanish colonial period

Dance scholar Marisa Montoya (2018), who wrote an extensive study regarding the implications of Spanish colonization between Mexican and Filipino dances, proposes the term “transculturation” to understand how dances developed in the Philippines during the Spanish occupation. Transculturation means that the subordinate culture (the colonized) chooses certain cultural items from the dominant culture (the colonizer) that they want to be transmitted or retained perpetually as part of their cultural fabric. In short, the natives had the chance to control as to what extent these cultural items from the dominant culture gets absorbed and how these should be used in their own cultural context (Pratt, 1991). This transculturation can also be explained by the *mestizaje* phenomenon in the Philippines. In contrast to the colonial experience of Mexico, the *mestizaje* identity or mixing of bloodlines occurred differently for Filipinos. If the blending of Aztec and Spanish blood resulted to the creation of a new cultural group, the interaction between the natives and the Spaniards produced Hispanic influences that eventually altered rather than combining with Filipino culture. The Spaniards simply imposed traditions to Filipinos, but the later retained their cultural heritage and worldviews (Montoya, 2018).

European dances brought to the Philippines through the Spanish colonization is categorized and labeled in the contemporary period as the

Maria Clara suite. The Maria Clara suite contains a series of dances that had colonial underpinnings but were subjected to changes or transformation when Filipinos added a native flare and distinct style to fit their context and preference. Dances such as the Waltz, Fandango, Polka, Habanera, Cachuchas, Rigodon, Lanceros and Jota were introduced to native society that resulted to an array of styles and sometimes they differed from one region to the next (Montoya, 2018; Santos, 2019). The Christianization of the islands also had an impact on how these dances were performed. According to Basilio Esteban Villaruz (1994), who wrote an important article in the historical essay “Philippine Dance,” Christianity became a part of the native psyche to the point that it had been synonymous to the spiritual and communal expression of the natives. As such, these dances depicted “idealized and gender-based virtues” that evolved in the context of religion, courtship, love and even flirtation (Montoya, 2018, Patrick, 2014).

In the discussion of the Filipino precolonial dances, it shows us the fascination of locals in the usage of iconography and props to convey meaning in a dance form. When European dances were introduced to native society, a passion for ornamentation continued to ensue and transform these dances to be part of the Philippine dance tradition. Items such as bamboo, coconut, shell castanets, Christian icons, candles, scented handkerchiefs, *pamaypay* (hand fan), native gestures, among others, were inculcated. The same is true for musical accompaniment that maximized native instruments (Santos, 2019; Villaruz & Tiongson, 2018). In dances about love and courtship like the *Cariñosa*, it is expected for female dancers to exude modesty in their actions, whereas the male dancers need to be aggressive, resourceful and sometimes naughty. Hand fans, for example, are used by female dancers to flirt or even show a form of reservation. In addition, there were precolonial dances that had been Christianized like the *Turumba*, which is a

dance veneration in honor of *Nuestra Señora de los Dolores de Turumba* (Our Lady of Sorrows) in Pakil, Laguna, the *Pandanggo* in Obando, Bulacan that is performed by couples as a form of fertility dance, or the *Simulog* in Cebu that started as an indigenous dance and later had been associated to the veneration of the *Santo Niño*. If not for love, courtship and religious manifestations, dances in the Spanish colonial period were also used as an instrument to empower the elite, the *principalia* and *ilustrado* class. Affluent families would host grand soirees and they favored to showcase European than indigenous dances. The *Rigodon de Honor*, a French quadrille, was the most popular dance routine practiced by the wealthy. It was conducted to highlight the feast day of the town’s patron saint, celebrating the arrival of the galleons that traversed the Pacific, or to welcome a new governor general or bishop (Villaruz et al., 2018).

Conclusion

Based on the historical narratives of the precolonial and Spanish colonial era in the Philippines, we can ascertain four points about the kind of transculturation that transpired between two different cultures. Christianity efficiently penetrated the daily life of early Filipinos because it did not contradict the religious beliefs of the natives. The use of Christian iconography and ornate rituals in religious ceremonies were embraced by the locals. Despite these, the natives developed a unique kind of Christianity known today as folk Catholicism. More so, while the traditional social classes of the precolonial days were altered during the Spanish colonization, the same set of people who governed the natives in the past continued to hold the highest esteem in society during the colonial period. They were rebranded as the *principalia* and *ilustrado*, who greatly influenced the religious, social and political atmosphere of the country. The status and role of women in society was also given prime

importance in the two historical narratives. In the precolonial days, she was a priestess, a matriarch, and a respected citizen with rights and privileges. During the Spanish colonization, she was not merely a decorative element in the household, but a woman of substance: engaged in teaching, trading, and active in church affairs. The indigenous dances of the precolonial era show that the natives used it as a conduit to commune with the spiritual realm, to celebrate the harvest season, imitate animals, among others. In all these dances, iconography and props were used to convey meaning. When the Spaniards arrived and introduced European dances, indigenous dances stayed, but there was clearly a preference for the dances of the dominant culture. However, to make these dances their own, Filipinos added the same flair present in the precolonial dances: they adapted the usage of iconography, props, and an assortment of gestures.

Where does the *bati* traditions of Angono, Ibaan and Parañaque align with the precolonial and Spanish colonial narratives? I posit that parallelisms between the two historical narratives exist in the context of the *bati* and that transculturation is present. The first known *bati* tradition started in Angono, Rizal in 1870. The dance routine was developed by a woman known as Tandang Apang Gil, who gradually transmitted it to succeeding *kapitanas* (Matilac, 2018). As the *bati* was made in the last phase of the Spanish colonization, Christianity was already ingrained as part of the Filipino character. Leaving aside its religious connotations, it may have been derived from the *ilustrado* aspirations of promoting an aspect of the dominant culture, which was a dance containing European elements, but at the same time subject to indigenous preference and interpretation. For one, a social hierarchy could be deciphered in the *bati* as those *kapitanas* were normally chosen from the affluent *principalia* and *ilustrado* families in town. Moreover, the role of woman in the *bati* takes centerstage. The Bible tells us that Jesus first

appeared to a woman, Mary Magdalene. In the anthropological sense, however, the attention to the role of women in the *bati* is much more than its theological counterpart. In both the precolonial and Spanish colonial traditions, we see the importance of women in society, especially in leading religious rites. What makes the *bati* a truly Filipino dance is its usage of iconography, paraphernalia, and literature: the *bandera* (either inscribed with “Alleluia” or emblems of Jesus) to convey the victory of the salvific promise of the resurrection, the various gestures that depict the joy of Easter, and even the *dicho*, a poem recited by the *kapitana* in Angono that expresses the pain and triumph of the Virgin Mary in line with Jesus’s death and resurrection. These then give us a glimpse of how two cultures intertwined in the *bati* traditions through the process of transculturation.

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**PERSONALITY DEVELOPMENT IN EARLY CHILDHOOD
THROUGH MUSIC EDUCATION**

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Abstract

The study focuses on a small but important segment of Hungarian culture, the musical education of children aged 3-7. Its central theme is to examine how the adaptation of folk games and related movements can be one of the most complex developmental forces in the personality development of this age group. This is because this period is fundamental in terms of cultural transmission and plays an integrative role in aesthetic education. As the pre-school child develops musically, his or her memory, imagination, associative abilities, creativity, attention and interest are constantly being developed through joyful activity, since his or her movements in connection with folk play are not yet guided and determined by the meaning and content of the text, but by the melody and its rhythm and the spontaneous feeling of joy associated with them. The role of musical education, and within it of folk games, is also evident in the process of emotional education, socialisation, intellectual development and language development. The links examined and presented demonstrate that folk games help children to develop skills that will enable them to become school-ready and to continue to develop in adult life.

Keywords: early childhood music education, folk games, personality development, cultural transmission, emotional education, socialisation, skills, school readiness

Discipline: musicology

Absztrakt

A KISGYERMEKKORI SZEMÉLYISÉGFORMÁLÁS ZENEI NEVELÉSSEL

A tanulmány a magyar kultúra egy kicsi, de gyermekeink szempontjából egyik jelentős szegmensére, a 3-7 éves korosztály zenei nevelésére fókuszál. Központi témája, hogy megvizsgálja miként lehetséges, hogy a

népi játékok és a hozzájuk kapcsolódó mozgások adaptálása az egyik legkomplexebb fejlesztőerő a korosztály személyiségfejlődésében. Hiszen a kultúraátadás szempontjából ez az időszak alapozó jellegű, s az esztétikai nevelés területén integratív szerepet tölt be. Az óvodás gyermek zenei fejlődésével emlékezete, képzelete, asszociatív képessége, kreativitása, figyelme, érdeklődése állandó örömteli tevékenység útján fejlődik, hiszen a népi játékhöz kapcsolódó mozgását ebben a korban még nem a szöveg jelentése, tartalma, hanem a dallam és annak ritmusa, valamint az ezekhez kötődő spontán örömméret irányítja és határozza meg. Az érzelmi nevelés, a szocializáció, az értelmi és az anyanyelvi fejlesztés folyamatában is nyilvánvaló a zenei nevelés, s ezen belül a népi játékok szerepe. A vizsgált és bemutatott összefüggések bizonyítják, hogy a népi játékok hatására olyan készségek alakulnak ki a gyermekekben, amelyek birtokában iskolaéretté válnak, s megállják majd helyüket későbbi felnőtt életükben is.

Kulcsszavak: kisgyermekkorai zenei nevelés, népi játékok, személyiségfejlesztés, kultúra átadás, érzelmi nevelés, szocializáció, készség, iskolaérettség

Diszciplínák: zenetudomány

Music and games, involving playful movements and evoking various emotions, is a natural condition of children's lives. As Zoltán Kodály wrote, „Singing is the instinctive, natural language of children, and the younger they are, the more they want to accompany it with movement. Singing games in the open air represent the integration of music and physical exercise, and provide the greatest source of joy in children's lives. Preservation of these ancient games is of paramount cultural and national interest. Those who did not play these games in childhood, miss an important part of their national identity.” (Kodály, 1982, 62-63.)

During my teaching career, spanning 40 years, I have always laid great stress on activities that may contribute to the development of auditory perception, music, rhythm and movement in preschool music education. Over the past decades, I have continuously followed the work of several kindergarten and dance teachers who lead groups of preschool children. Detailed analyses of their lessons and discussions with trainee kindergarten teachers have greatly expanded my experience and knowledge. For many years now, I have also been

researching and collecting variants of folk games and nursery rhymes associated with rhythmic movement from various regions of the country.

This study will focus on a small segment of our culture, which is nevertheless very significant for our children, i.e. the music education of children aged 3 to 7 years, the development of sense of rhythm and movement associated with it, and its role in children's personality development.

We must always bear in mind that preschool children are developing personalities, with their personality traits varying with age. They are unique and irreproducible wonders of nature, with individual talents, abilities, skills, needs, personality traits and behaviours. They develop best through playing a lot, and for this they need love, security and freedom. Their characteristic feature is that they are emotionally driven, they are honest, unprejudiced, and have great powers of imagination. If a child does not know something about the world, they will use their vivid imagination to fill in the details, just as natural peoples or members of traditional cultures do.

We can integrate many elements of Hungarian folk culture into kindergarten education. From the

very beginning of childhood we can exploit the wealth of knowledge that has been honed and handed down from generation to generation. Folk poetry may be used in story and rhyme sessions; a variety of folk games are useful in music education, folk crafts involving activities with natural materials in visual education, and game sequences consisting of basic movement forms and steps in developing movement. The complex process of aesthetic education builds on the inclination of children for spontaneous and original speech, singing, movement and visual expression. The main task in literary, music, visual and environmental education is to develop the child's specific abilities through various activities within a playful context.

Kodály's concept (method), which defines Hungarian musical education, basically applies the values of folk culture to the development of children's musical skills and abilities. Its aim is to teach children a musical mother tongue and the manual skills and subconscious contents associated with it. This period in a children's life is therefore fundamental for the transmission of culture and plays an integrative role in aesthetic education. The important role of music education is also evident in the process of emotional education and socialization. The communal nature of circle games offers many opportunities in this area. Singing develops the children's sense of belonging, dissolves their inhibitions and improves their awareness of rules and the songs that are played to them have a profound impact on their emotions.

The emotions they experience not only help them to understand each other's personalities, but also raise their awareness of the importance of adaptability. Achieving intellectual development requires biological maturity. If the sense of balance is underdeveloped in a child, s/he will have more difficulty in performing motor tasks, and the centres that control their functioning will develop more slowly. This also shows that tasks aimed at improving one area will strengthen other areas to

the same extent. Thinking can be developed through the varied texts, movements and spatial forms associated with singing games, while creativity and imagination can be developed through improvised movements and dancing, setting music to rhymes and stories, and sometimes improvised instrumental accompaniment.

What does all this mean for preschool music education? Children's movement activities and desire for movement are at their peak at age 3-7, therefore kindergartens must do their utmost to promote the child's well-being by establishing a rhythm in their life, in which physical activity plays a central role. Children enjoy movement because movement provides opportunities for playing and is a source of pleasure. It is adults who can supply children with such opportunities, and this is where the responsibility of the kindergarten teacher lies. Besides physical education, it is music education that can best serve the child's intensive and multifaceted movement and psychosomatic development. Movement, combined with joint singing, playing and moving, develops the abilities and personalities of kindergarten pupils in a multifaceted and complex way. Through joyful activities, the 3-7 year old child's memory, imagination, associative abilities, creativity, attention and interest develop rapidly in parallel with the development of music, since at this age movements related to games are not yet guided and determined by the meaning of the words, but by the melody and its rhythm and the spontaneous sense of joy associated with them.

The varied elements of movements in folk games play an important part in developing gross motor skills and increasing physical endurance. The movements involved in walking, running, clapping, crouching, spinning and skipping induce both physical and mental activation thus creating a close link between the two. The development of the sense of balance is also linked to this, as it is already complete by the age of 6-7 years.

From this it follows that this ability can be developed in later years only to a limited extent, even with a great deal of extra work. Its emergence and development is closely related to the perception of rhythm. If children are to sense the rhythm of movement, they must possess a certain level of development of the sense of balance, while at the same time the latter is strengthened and developed by rhythmic movement.

The development of fine motor skills is of particular importance in the process of learning to write, because music development can effectively promote the proper use of writing tools, the control of hand movements and proper hand-eye coordination (for example, through the perception of the uniform rhythm of songs and rhymes achieved through various forms of movement – touching fingers together, tapping knees, „nutcracking” by hitting fists together, clapping, using musical instruments and objects in games, handling and passing on to each other head-dresses, etc.).

Music can play a role in developing linguistic skills in the mother tongue, especially the ability for oral expression and comprehension of verbal information, as well as eliminating speech defects. The steady beat of songs and rhymes prepares for continuous speech, and this can be enhanced through regularly repeated movements. If we are to prevent learning difficulties that may be experienced later on (dyslexia and other difficulties in learning to write, read or count), it is of paramount importance to realize that movement (e.g. clapping, stepping, tapping and other rhythmic movements adapted to the words) have an irreplaceable role.

To make children feel the rhythm, tasks such as pronouncing words rhythmically syllable by syllable will also help to learn syllabification, while using playful word-elements will provide practice in pronouncing various sound sequences. We may find plenty of examples for such tasks in rhymes and singing games alike. If teachers take into consideration the individual gifts and abilities of

the children, and if they focus music education on their needs, then the children will develop the skills and abilities that will help them to become ready for school and enable them to get on well at school as well as later on in adult life. Music, rhythm, movement, dancing and game activities will ensure for them a complex experience and at the same time opportunities for development that will enrich their emotional life, expand their vocabulary and general knowledge, and make their movements more coordinated and aesthetically more satisfactory. Those who are surrounded from birth by music and singing games from „a pure spring” (as Bartók puts it) will be spiritually and mentally different from those who have not had this experience.

„The intellect of children[...] is a clean slate, in which both good and bad can equally be engraved, leaving a lifelong imprint.[...] This is the responsibility that those who enter the teaching profession must undertake. Music education is one of the most controversial areas of education: in no other area are children exposed to so many and so many different external influences as here. A teacher whose heart is full of trashy music and is ignorant of the beauties of noble music, the thrilling experience of listening to masterpieces and the exalting feeling of emotional fullness and elevation that comes with them cannot in good conscience teach children to love music. Therefore, responsibility towards the child obliges teachers to do some soul-searching!” (Törzsök, 1982, 26).

- Music education should start as early as possible. „It is in the kindergarten that it should begin, where the child learns in a playful way things that are too late to learn in primary school.” (Kodály, 1982, 93.)
- Music education should be focused on singing. „Singing liberates, encourages, does away with inhibitions and shyness. It concentrates the mind and trains you for attention and discipline. It moves the whole person, not only a certain

part of it. It develops the community spirit." (Kodály, 1982, 304.)

- It is important to give priority to activity. „The direct and natural relationship with music is reinforced by the practice of movement combinations, which must be approached in a complex way, combined with literary and visual activities.
- Folk games lay the foundations for the subconscious elements of national identity. In preschool music education folk traditions represent the best device to lay the foundations for national identity. Rhymes, game songs and folk songs may teach children principles that continue to be valid even today.
- A top priority is to form an organic connection between music and physical activity in the educational process. „The instinctive, natural language of children is singing, and the younger they are, the more they want to move at the same time ... Singing games in the open air have since time immemorial been the greatest source of joy in children's lives.” (Kodály, 1982, 62.)

At about the same time as Zoltán Kodály, several music teachers from all over Europe were reforming the structure and methodology of music teaching (Carl Orff in Germany, Emile Jaques Dalcroze in Switzerland, Shinichi Suzuki in Japan, Justine Bayard Ward in the USA, Edgar Willems in Flanders and Maurice Martenot in France). Their methods are known and used worldwide. All of them lay special emphasis on the role of early childhood, the importance of starting to learn music at an early age, and active participation in the process of making music. All of them recognize the importance of free rhythm, free melody, and improvisation, which appear in Kodály's work as a means for active style study. While the pedagogies of Kodály and Willems are vocally based, Orff and Dalcroze start from the vibrations and the movements of the body.

Dalcroze's vocal material reflects the tastes of the early 20th century French school.

A basic identity between the different approaches is that they start with valuable music and by training the ear they lead the children to valuable music. The differences lie in the practical aim: while Kodály developed a concept designed to educate the nation and to exert influence on a mass scale, and made the recorder the centerpiece in music education for children, Willems created an extracurricular music school where after a preparatory period of 3 years, everyone learns to play the piano and melody instruments and practices coral singing. The piano is also an essential instrument in Dalcroze's method. Orff uses xylophones, metallophones and rhythm instruments to support the singing of pentatonic children's songs in early childhood.

Movement is a priority in all these methods, although in Kodály's method this is manifested mainly in teaching folk roundelays. So we have several great masters with several approaches to teaching music. Perhaps it is worth considering how, by adapting some of the ideas of the other methods, the work of our teachers can be made more meaningful and effective. Since one of the most characteristic features of the 3-7 age group is a high degree of activity and agility, which also has a decisive influence on the development of their adult personality, teachers should do their utmost to create, already at this stage of life, the conditions for regular and effective movement in a game context. Movement development in this age group is characterised by the perfection of movements that have already been learnt and the emergence of the first movement combinations.

This development is manifested in three areas: „It is manifested in improved performance, in the quality and accuracy of movement execution and in the combination of already acquired movements” (Farmosi, Gaál, 2007, 9.). In terms of motor development, the 3-7 year age range is not a uniform

period. Research shows that 3-4 year olds are still characterised by the specificity of toddler movement. A major change affecting all forms of movement, such as crawling, walking, running, hopping, throwing, catching, pulling, pushing, hanging, turning, rolling and balancing, comes at age 5. With the development of these movements the basic conditions for the young child's psychological development come into being.

The biological joy deriving from performing movements and the feeling of self-confidence deriving from successful execution provide irreplaceable childhood experiences that have an influence on subsequent personality development. And since the primary aim of movement development in this age group is to train for natural, harmonious movement, to develop physical abilities, to satisfy the child's need for exercise and to develop the child's emotional and volitional sides, movement activities must be varied and must pervade the whole of kindergarten life. Beyond music and physical education lessons they must be present in free play, environmental and aesthetic education as well as in care and self-care activities. The most important tasks for movement development in the age group under study are:

- development of physical and motor skills,
- development of large movements, sense of balance, sense of metrum and rhythm
- through rhythmic activities, development of fine motor skills, eye-hand and eye-foot coordination;
- development of the body schema by gaining familiarity with the body parts and
- coordination between them and promotion of the development of personal zone, achieving complex coordination between auditory and visual stimuli and movements, development of movement-related vocabulary (Wirkerné, Tamásiné, 2015).

By repeating spontaneous movements children become aware of the consequences of their motor

behaviour, and try to act it out again and again. The intention to repeat implies that the link between motor behaviour and its consequences is already beginning to be ingrained in the cerebral cortex. Movement skills develop together with motor skills (conditioning, coordination, joint flexibility). Motor skills are a prerequisite for performing movement activities (Báthori, 1991).

A very important factor in developing motor skills is that, while this is the most favourable age for the development of these skills, it is very vulnerable to faulty methods. The mistakes made at this age have a much more lasting effect than at other periods of the child's life. The development of large movements is a priority area for 3 year olds, but in a more advanced form it must continue in all age groups, as it is the basis of all movement. A particular movement sequence develops several functions at the same time, so it is difficult to isolate the different areas. Therefore, large movements must always have a privileged role in education and development, because subsequently they will be further fine-tuned and specified in detail. Hopping, for example, will develop into jumping, landing will become more and more secure, promoting the development of fine motor skills related to balancing. Among large movements, walking, running, crawling, slipping, climbing and jumping cannot be separated from the balancing functions. Even the simplest form of movement can be made more difficult, therefore they can only be described only according to the functions to be developed by the given task.

The sense of balance of the body depends on the vestibule (balance sensing centre) located within the inner ear. The three semicircular canals found here, with the help of the fluid that they contain, detect the movement of the body, the exact direction of movement and even its intensity. When a body is out of balance, it tries to regain its balance by activating various muscle groups.

Naturally, the more skilled a child is in back-and-forth feedback (balance perception and motor response), the sooner they will regain balance. (Tótszöllősyné, 1999) This movement process can only be achieved through a lot of practice. 3-year-old children still experience difficulty standing on tiptoe, in a row or in a line, 4-year-olds have difficulty standing on one leg, but in six-year-olds the different muscles of the sole already work alternately to maintain balance.

Emergence of the sense of balance and the related sense of rhythm is complete by age 6-7. At later ages, these abilities can be developed only at the cost of vast amounts of effort and to a small extent. Children practise this skill in games played with the kindergarten teacher, who recites rhymes for rocking, bouncing, lullabies, etc. Naturally, a cosy atmosphere is also a particularly important aspect of this. Parallel with the development of these two abilities children will learn to sense the rhythm of movement, and rhythmic movement has a washback effect, strengthening the sense of balance.

Development work based on the transfer effect of large movements gradually progresses to fine movements over the 3 or 4 years. To enable these movements, the child must acquire the ability to control small muscle bundles separately. The more inhibitory processes – braking, sudden stops - are present in the child's movements, the more coordinated his movements and the more developed his fine motor skills are.

During the kindergarten years we play many fine-movement games with the children to develop a sense of steady rhythm. The eye-hand, eye-foot coordination development area develops control of a larger area of muscle movement compared to fine motor movement, but a smaller area compared to large movements. These areas of control include, for example, jumping, turning, throwing and rolling a ball, kicking it, dropping a handkerchief, clapping in front of or behind the body, etc. One of the

most sophisticated forms of eye-hand coordination is manifested in the skill of writing. This coordination skill develops around the age of 5. Through experiencing movement we form a map not only of our environment, but also of our own body. This is what we call the body schema. The sense of balance and the information gained from body positions are combined with visual information and become integrated into a functional whole to form the body schema. From various kinds of feedback the child develops an internal picture of the location of body parts relative to other body parts. Therefore it is necessary for children to learn their own bodies and body parts and to experience their own movements. (Tamásiné, 2015).

The information that children experience as their bodies move is deeply imprinted in their memory. It is while performing movement that they first get information on the circle (e.g. run around in circles). Perceptual stimuli act in combination with the visual (they see the shape) and verbal stimuli (they hear the name) while running, crawling and jumping in and out. This makes memorisation more effective, because movement and form perception develop simultaneously in these exercises. Consequently, it is not only through hearing, seeing, tasting and touching that the world can be sensed, but also through movement.

The importance of words in rhymes and songs increases with age, and becomes an important source for enriching the children's mother tongue vocabulary. Some of the words that children encounter in songs and rhymes are no longer used in everyday discourse, but their understanding is facilitated by the context of the game. Kindergarten children, by learning the words of singing and rhyming games may receive a cultural heritage of enormous value. Although at the age of 3-4 this heritage is still very limited in terms of the meaning of the texts, its importance increases with age, and together with the „repetitions” the psychological

impact is immeasurable. The speech, movement and behaviour patterns learnt in games, repeated in real-life situations, serve to reinforce the children's sense of security, and the increasingly conscious interpretation of the meaning and context play an important role in deepening mother tongue skills.

Folk games, because they do not belong to a written culture, do not possess a single, original, fixed, authentic form. These melody variants are not copies or imitations, all of them are original, of equal value, expressing the different tastes of people living in different regions. Their users, i.e. the children, have constantly modified them to best suit their purposes and tastes. Children have always been active users of these games, and have obviously shaped them, and so the games have been honed in this way down the generations until they reached their present form. This cultural diversity should be preserved and care should be taken to ensure that the same variant does not spread all over the country to the exclusion of all others, and to foster the continued use of local variants in the different regions.

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**THE KAFALA SYSTEM:
EXPLORING INTERSECTIONALITY IN THE INTEGRATION OF MIGRANT WORKERS
TO THE LABOR MARKET IN JORDAN**

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Abstract

This research project will explore migrant workers' experiences with the patronage-based kafala system in the Hashemite Kingdom of Jordan. While many research attempts have delved into disclosing the restricted and exploitative aspects of the varying experience of the migrant workers, there is still a dearth of attempts that explore the way the migrant workers flexibly and strategically employ their multiple and intersecting identities to seek upward professional and social mobility. Through the implementation of an intersectional and actor-centered approach, and the use of a qualitative design, this project seeks to explore the dynamic interaction between migrant actors and representatives of institutions in Jordan. By pursuing a qualitative and intersectional analysis of the migrant workers' experiences with the kafala system, the project aims to contribute to a better understanding of the interplay of transborder mobility and institutional dynamics.

Keywords: mobility; migration; institutions; Jordan; intersectionality

Discipline: cultural anthropology

Absztrakt

A KAFALA RENDSZER: MIGRÁNS MUNKAVÁLLALÓK INTEGRÁCIÓJA A JORDÁN MUNKAERŐPIACON AZ INTERSZEKCIONALITÁS PERSPEKTÍVÁJÁBÓL

A tanulmány a migráns munkavállalók tapasztalatait vizsgálja a patronázs-alapú kafala rendszerrel kapcsolatban a Jordán Hashemita Királyságban. Számos kutatás foglalkozott már a migráns munkavállalók korlátozó és kizsákmányoló aspektusainak feltárásával, azonban még mindig kevés az olyan kísérlet, amely azt vizsgálja, hogy a migráns munkavállalók miként alkalmazzák rugalmasan a stratégiaileg többszörös és

egymást keresztező identitásukat a szakmai és társadalmi mobilitás érdekében. Jelen tanulmány interszekcionális és szereplőközpontú megközelítés alkalmazásával felépített kvalitatív terv alkalmazásával igyekszik feltárni a migráns szereplők és az intézmények képviselői közötti dinamikus kölcsönhatást Jordániában. Az elemzés célja a migráns munkavállalók kafala-rendszerrel kapcsolatos tapasztalatainak minőségi és interszekcionális megismerése, annak érdekében, hogy hozzájáruljon a határokon átnyúló mobilitás és az intézményi dinamika kölcsönhatásának jobb megértéséhez.

Kulcsszavak: mobilitás, migráció, intézmények, Jordánia, interszekcionalitás

Diszciplína: kulturális antropológia

Background and Literature Review

The Hashemite Kingdom of Jordan is a country strategically located in the Middle East. Historically, Jordan has been at the crossroads of migration, influenced by geopolitical and economic factors in its neighborhood that have determined its migration reality and policy (De Bel Air, 2016). Conflicts and instability in the neighboring countries have been the main drivers of migration, while economic factors in the adjacent Gulf countries have also played a key role, particularly with regard to outflows (I1). Over the past decades, Jordan has become a regular destination for migrant workers, particularly from Egypt, Syria, South and Southeast Asia.

Jordan relies on foreign migrant workers – many of whom are undocumented – in several sectors, including construction, agriculture, textiles, and domestic work; according to an NGO in 2018, workers in these sectors are the most vulnerable to trafficking because of informal work agreements and frequently changing employers. In 2020, officials estimated the total number of foreign workers in Jordan could be as high as 1.5 million. The Ministry of Labor reported issuing 246,646 work permits for foreign workers in 2020 and 425,220 in 2019 (I2).

The population of Jordan comprises 9.5 million people (I3), including around 2,100,000 Palestinians (I4), 655,990 Syrians (I5), and approximately

315,000 registered migrant workers (I6). Egyptians represent a large majority of the total migrant workforce (61.63%), followed by Bangladeshis (15.66%), Filipinos (5.37%), Sri Lankans (4.72%), and Indians (3.65%)(I7). The number of undocumented migrant workers is estimated to be anywhere between 150,000 and 250,000(I8), bringing the total number of migrant workers much higher than the figure officially disclosed, to a gross estimate ranging from 440,000 to 540,000 migrant workers.

Since the 1970s, Jordan had opened its door to an increasing number of migrant workers. In contrast to the Gulf Cooperation Council States (GCC), which experienced a significant influx of migrants following the discovery of oil and the subsequent start of significant infrastructure projects, Jordan does not have an oil sector. The country has nevertheless drawn a notable number of unskilled and semi-skilled migrant workers to fill positions that offer low wages such as domestic work, agriculture, construction, and services. However, Jordan adopted a protectionist policy in 2007 to supplant migrant workers with Jordanian citizens as a result of high unemployment rates and the massive influx of unskilled foreign workforce (I9).

Similar to the GCC countries, crucial characteristic of Jordan lies in the fact that its labor market regulations are closely intertwined with

immigration control (Ngeh and Pelican, 2018). A key institution for regulating labor migration is the patronage-based *kafala* or sponsorship system, which dictates the entry, employment, and residence of migrants in Jordan. This immigration system, codified in law No. 24 of 1973, regulates the entry and stay of foreigners (I10). The *kafala* has been described as “essentially an employer-led, large-scale guest worker program that is open to admitting migrant workers, but at the same time restrictive in terms of the rights granted to migrants after admission” (Ruhs, 2013, 98.).

Though Jordanian Labor Laws protect all workers, regardless of their nationality, there have been recorded instances of exploitation and harsh working conditions (Coleman, 2022). Employers have the power to cancel migrant workers’ visas, revoke their legal residency in the Kingdom and leave them to face deportation. While in principle all migrants are confronted with the same system of migration control and with a labor market geared to international workers, previous studies show that the latter’s experiences and strategies vary significantly (Coleman, 2022). According to the Law on Residence and Foreigners’ Affairs, which applies to all workers, the Public Security Directorate (PSD) is responsible for all matters related to the residency of foreigners (Article 3(a) of the Law No. 24 on Residence and Foreigners’ Affairs of 1973.) To enter Jordan, all migrant workers must first be sponsored by an employer and are not allowed to change employment nor exit the country without permission from the employer, usually in written form. The worker nevertheless can leave the country (with the exception for Egyptians) unless their employer issued a felony complaint. By doing this, the worker will lose several rights including social security and their return ticket. In case the worker leaves their employment, the sponsor must report to the immigration authorities. It is also the sponsor’s job that the worker leaves Jordan after the contracts

end, including paying for their flight ticket home (I11: Migrant Forum Asia: Policy Brief No. 2: Reform of the *kafala* (sponsorship) system).

Even if the working contract is signed for a longer period, residence permits are issued after presentation of a Jordanian work permit are given only for a period of one year and subjected to renewal. Employers are responsible for the annual renewal of the permits. However, if the migrant worker overstays the legal residency duration without submission for the annual renewal within a month of its expiry will be subjected to a fine of JOD (\$64). As a result, the migrant worker poses practical issues in case their residence permits are not renewed while legally, it is their employer’s responsibility to do so. This very factor has led many migrant workers to a dilemma: they cannot leave the job, and at the same time are unable to obtain a legal residence permit to continue staying in the country.

According to Jordanian Law No. 8 of 1996 (Labor Code), it is difficult for a worker to leave their job without obtaining prior permission from the employer to “release” them (“Release” is a term employed by countries applying the *kafala* system to refer to the mandatory permission that an employer has to give to the worker in order for him to change employer). If the employee wants to terminate before the working contract expires, their employer has the rights to claim the damages arising from that termination “provided that the amount that the employee shall pay shall not exceed the wage of a half month for each month of the remaining period of contract”. Considering that contracts are generally signed for more than two years, one can imagine the considerable financial means that a worker must pay if he wants to break the contract or transfer to another employer. While the purpose of this provision is to protect the rights of the employer who has paid recruitment costs, it also disproportionately puts the burden on workers who are often unable to pay and left with

no other choice than to finish the term of their contract (I10).

Indeed, one key and problematic issue emerging from the immigration and employment laws is related to the worker's freedom to leave the employer after the beginning of the contract. Under those laws, the contract of employment can only be terminated if both parties agree to terminate it, if the duration of the contract has expired, or if the worker dies or is no longer capable of working due to a disease or disability certified by a medical authority (ILO, 2012, 126-127.). As a result, migrant workers in Jordan are stuck in a loop and pose problems in mobility as well as basic human rights when it comes to forced labor.

In his research on domestic workers in Jordan, Lara (2022) concluded that the migrant workers are placed in a position of liminality. On the one hand, the law recognizes the precarious situation of migrant workers and even takes action against employers who violate non-human Jordanian's rights. Researchers and human rights activists have widely acknowledged that Jordan stands out in the area for including domestic workers in the Labor Law. Lara (2022) also points out that this is even attributed to Jordan's status as a migrant worker sending country. On the other hand, the law also treats migrant laborers as criminals when the terminology "slavery" implies that they are not truly free in the Kingdom. Employing the approach of Black feminists on his research, Lara also suggests that the domestic workers' identity is only associated with their labor, and that the domestic worker sector in Jordan is highly gendered and racialized. In the case of Jordan, women from particular ethnicities such as Filipina and Ethiopian are much preferred because of a gendered and racialized expectation on them. The "girls" are then ranked and categorized as mere commodities. I would argue that while most of Lara's findings can be true, he might have overlooked the aspect of how the domestic workers

themselves could use their social positionings to strategize their professional and social mobility. Sweidan (2018) analyzed the migration population data conducted by the Department of Statistics in Jordan and cited that migration can help raise women and men from the lower to the lower-middle class socio-economic ranks (ILO, 2004; De and Ratha, 2005). Many migrant women take the opportunity to purchase land or real estate using their earnings in their countries of origin (e.g. Indian and Filipina migrants). Many others tend to remit more of their earnings than men, and to exercise control of their household income by ensuring the remittances are spent on food and clothes for the family back home (IOM, 2005b). My research aims to explore such cases wherein the same women could escape the domestic place to pursue upward mobility both in Jordan and in their home countries.

While there have been several research attempts aiming to explore the migrant workers' experience with the kafala system in the Middle East, the number of studies that employed intersectional analysis and methodology are relatively rare. The studies so far have expressed an inclination to shed light on the restricted mobility and exploitative aspect of the kafala while attempts that put an emphasis on the migrant workers' flexibility in maneuvering through that system are not enough abundant.

Ngeh and Pelican (2018), in their study on African migrants' integration to the labor market in the United Arab Emirates, have contended that while Gulf societies are characterized by social hierarchies and multiple vectors of inequality such as ethnicity, gender, and class, African migrants have flexibly used their intersecting positionalities, in particular ethnicity, nationality, race, and gender, to renegotiate their place in the segregated UAE economy and seek upward professional and social mobility. The notion of migrant workers being able to employ the very positionalities that are usually

used against them to pursue upward professional and social mobility, are particularly influential to the foundation of my research project. Ngeh and Pelican argue that, [...while in the beginning African migrants are generally channeled into low-paying, elementary occupations, they are not clearly positioned in the UAE labor market. There is leeway for negotiation and upward professional and social mobility]. My research aims to explore similar notions in Jordan but focus more on the varying experiences of migrants from the Global North and the Global South through three case studies: migrants from Europe, from South and Southeast Asia, and from other Arab countries.

This research project aims to explore the experience of migrant workers' experience with the kafala system in Jordan; it seeks to explore the role of the kafala system in the social positionings of migrant workers, what experience and how the migrants incorporate it into their survival strategies. Going beyond existing research, the project focuses on institutions of migrant self-organization and considers the kafala system not only in terms of its restrictive dimensions but also in terms of how migrants productively incorporate it into their strategies.

By exploring the experiences of migrant workers, this research project aims to: (1) describe the experiences of migrant workers with the kafala system in Jordan, (2) identify values, rationales, and theories behind the interplay of the migrants' mobility and institutional dynamics, and (3) compare and contrast the gathered data with the existing literature on migration, intersectionality, and institutional interaction in the region.

This project will simultaneously explore: (a) how kafala works as of today, (b) the effects it has on the migrants' social positionings, and (c) strategies and methods that the migrants extract from the system. Research questions will concentrate on the dynamic interactions of the

migrants and the kafala system. How do migrant workers seek information relating to employment in Jordan? Where do they obtain the information needed and why do they use the sources they do? Which institutions that facilitate their journey? What experience confronted the migrant workers and what is the outcome? Are the differences among the integration strategies of migrant workers from the three case studies?

Methodology and Conceptual Framework

Inspired by the work on African migrants in the United Arab Emirates by Ngeh and Pelican, I would like to employ intersectionality as both a conceptual and methodological framework for my analysis. Coined by Crenshaw in the late 1980s in the context of the rise of critical race legal studies, intersectionality has evolved beyond legal studies to become a conceptual framework effective to identify multiple factors of advantage and disadvantage. Intersectionality highlights the interlocking and mutual constitution of different forms of social positioning such as gender, class, and several others as opposed to viewing them as separate and essentialist categories (Ngeh and Pelican 2018.) Scholars, such as Moraga and Anzaldúa (1981) were the precursors to introduce intersectionality to anthropological analysis where in other categorizations are included. Despite a lack of consensus on the definition of intersectionality, its key proponents agree that members of minorities tend to experience inequalities in varying configurations and degrees of intensity (Ngeh and Pelican 2018.) The crucial influence on my topic draws from the notion that social actors not only endure disadvantage and constraints, but actively negotiate and employ their multiple and intersecting identities (Lutz 2015; Ngeh and Pelican 2018). In recent years, intersectionality has shown itself to be an approach compatible to migration studies (Anthias 2012; Bastia 2014). While much of the theoretical analysis has drawn

on research in the United States and Europe, there is still a shortage of studies focusing on other parts of the world. A notable exception is the volume edited by Plüss and Chan (2010), which looks at intersectionality in transnational contexts in different parts of Asia. In the case of Jordan, I could not find any studies that put an emphasis on how intersectionality plays out in the Kingdom. By adopting intersectionality as an analytical and methodological approach, this research project aims to identify the social positionings relevant for migrants in the Hashemite Kingdom of Jordan, and to understand how they intersect and interact with each other. Adopting the methodological proposals of Anthias (2012) and Lutz (2014) and the work of Ngeh and Pelican, this research project will focus on not only individuals' structural constraints but also on how they negotiate and utilize their multiple and intersecting identities.

Methodologically speaking, this project will center on a set of qualitative data gathered from fieldworks in Jordan (one month every summer from 2023-2025, three months in total.) I found Amman, the capital city of Jordan, the ideal location for my field site to take place, given my personal connection and the fact that most migrant workers live here and that there exists a significant number of recruit agencies located in the city. The use of social media will also be employed, given the existence of several social groups of migrant workers (e.g. Indian and Filipino) on Facebook and Telegram. I plan to join these groups and gather general information about their lives in Jordan based on posts and comments, to further develop connections to later meet in Amman or through online platforms. I will also research local agencies in Amman and other countries to explore the recruiting system and how it works.

Upon researching migration and transborder mobility, auto-ethnography will also be applied

for its usefulness in featuring and exploring the migrant workers' experiences and perspectives as a means of insight, and in using emotions and bodily experience as means and modes of understanding. Focus group interviews of purposively sampled peer groups may also be employed as a mode of data collection, for it may render the participants more comfortable than one-on-one interviews and allow us to explore social sharing of information among peers—a concept central to the theory of Information Grounds. In-depth individual interviews will be employed, if necessary, in order to access individuals with perspectives of theoretical value who are unwilling or unable to participate in a group setting. Interviews will be facilitated in a semi-structured manner, embedded with open-ended probes to allow other themes to emerge. By pursuing a qualitative and intersectional analysis of migrant experiences with the kafala system, the project promises to contribute to an intricate understanding of the interplay of international mobility and institutional dynamics.

In the following section, I would like to introduce two case studies that would further illustrate how intersectionality comes at play in the integration of migrant workers in the Middle East both in its restrictive and dynamic nature. Please note that all names, except for the authors, in the case studies are altering for the sake of anonymity.

Case study 1: Corazon being domesticated as a housekeeper in Jordan

Conducted by Jeromel Dela Rosa Lara in 2022, his study focusing on Filipina domestic workers in Jordan has shed light on the restrictive and exploitative aspects of the sponsorship system implemented in the Kingdom. In 2015, there were 53,882 registered migrant domestic workers and approximately 50,000 worked in irregular situation in Jordan (Ministry of Labour Statistics on the number of work permits delivered to foreign

domestic workers, per nationality, 2015). The majority of Filipina workers are employed in the “care service” category that involves: “...*cleaning the house, cooking, washing and ironing clothes, taking care of children, or elderly or sick members of a family, gardening, guarding the house, driving for the family, and even taking care of household pets.*”

According to Lara, it is the human body that is commodified in the market labor in comparison to other commodities such as water and oil. Domestic workers in the Middle East in general and in Jordan in particular are often taken for granted by the society that benefits from them to the point where they are *invisibilized* (Lara, 2022, 7.). For the case of Corazon, a single mother, Filipina domestic worker employed by a Jordanian family, she went to Jordan to make a better living for her children still in elementary school back in the Philippines. In an interview with Lara, Corazon shared that she had never had the simple and basic ability such as leaving the house on her own. Corazon’s world in Jordan was restricted in a small room where she could only tell what happened outside through the vantage view of a window because her employers would lock the house every time they went outside to make sure that Corazon would never leave. In this situation, Corazon’s spatial mobility was entirely restricted.

Upon arriving to Jordan and meeting her employers, Corazon’s personal items such as passport, work and residence permits, and mobile phone were immediately confiscated. The husband of the female employer eventually allowed her to use the mobile phone but with one condition: the female employer should never find out that Corazon was able to communicate with the outside world via the internet.

Corazon’s salary was sent directly back to her family in the Philippines with whom she was not allowed to stay in touch and could only contact them in secret after a long time. From this aspect, Corazon’s social mobility was also restricted.

From this case study, we can see that upon employment searching, Corazon could easily find a job as a housekeeper from the recruitment agency in the Philippines, given the existence of a preferred racial hierarchy for housekeepers in Jordan where Filipina women stay on top (Lara, 2022). Unfortunately, that was all Corazon could employ for her journey to Jordan where it stopped at her incarcerated three years employed by the Jordanian family. This case study of Corazon shows the restrictive and exploitative of the Kafala system where migrant workers are denied fundamental rights such as spatial and social mobility. Lara concluded that migrants working in the domestic sphere in Jordan are being *domesticated* and *invisibilized* in the Jordanian household.

The second case study would illustrate another side of the Kafala system that has not shown a substantial amount of research attempts: how the migrant workers strategically and effectively employ their multiple and intersecting identities to navigate through life in the Middle East.

Case study 2: Myla employing her East Asian identity to start a K-pop business

During my trip to Jordan to conduct a fieldwork for my master’s thesis (Tran, 2020, 59.) in 2020, I met Myla, a twenty-six-year-old woman from Chongqing, China. She was a member of the Jordan K-pop Lovers community (JKL) where young Jordanians meet to share and discuss their fervent interest in Korean Pop Music. Myla arrived to Jordan in 2016 “*out of boredom*” and to keep a distance from her mother because she is “*very controlling and makes my life miserable.*” Back in Chongqing, Myla attended Chongqing Jiaotong University for three semesters studying Business Administration before dropping out because attending college was never what she wanted but rather her mother’s. With the help of a relative, Myla made her way to Jordan to work in an Asian grocery store in Jabal Amman. Based on the nature

of the Kafala system, Myla is tied to her employer in terms of legal status and mobility. In theory, her employer could have dictated her employment mobility, limited her social life, or even confiscated her passport (though prohibited by laws), Myla was nevertheless given the freedom after work and was neither exploited nor physically and mentally abused like many migrant workers in Jordan. “...*oh my boss is also Chinese, he is super cute and lets me do whatever I want. We Chinese are supposed to take care of each other you know.*”

As we can see from here, Myla had effectively employed her identity as a Chinese woman from her very first attempt at entering the country using the connection with other Chinese locating in and outside Jordan (her relative and her employer.)

In 2018, K-pop started to enjoy worldwide influence as idol groups such as BTS and Black Pink successfully broke into international markets. Backed with a substantial fund from the Korean Ministry of Culture, K-pop had reached more and more audience with its colorful music videos and catchy songs; the genre had quickly spawned a large number of communities around the world, and Jordan K-pop Lovers is one of them (Tran, 2020, 59.). During its nascent days, the JKL was just simply an online community that was later transferred into the physical world by its leaders. Myla joined the community in 2019 and quickly became a regular attendant to almost all the JKL's offline meetings. According to Myla, making friends in the community was “extremely easy” because of her identity as an Asian woman, given that most of the members are female and that gave her such a significant advantage over her male counterparts.

“...you know what's interesting? Everyone in these meetings just wants to talk to me, probably because I am Asian, and it is the closest thing to K-pop they could ever find here...”

Myla became quite popular in the JKL community where she had made a remarkable number of friends. With the connections newly

established, Myla started her own business where she purchases K-Pop merchandise such as CDs, posters, and K-Pop-themed accessories from China and resells it to her friends in Amman. These purchases are then shipped together to Jordan with the products from the grocery store in an agreement with her employer. With K-Pop grows exponentially in its popularity, Myla's business has only thrived ever since. She works no longer for the grocery shop but nevertheless still pays her employer monthly fees (that would cover her tax duties in Jordan), and this very transaction is what has kept her stay in Jordan legal. It is even more significant to mention that her employer does not ask for any additional fees and offers to transfer Myla's purchases from China for free because they are “both Chinese and are supposed to help each other.”

Drawing from the story of Myla in Jordan, we can see that she has effectively employed her multiple and intersecting identities (e.g. Chinese and woman) to navigate through life in Jordan. She first found a job in Jordan aided by a relative in China (1), worked in an Asian grocery shop in Amman (2), effectively made friends in the K-Pop community using her popularity as an Asian *and* woman (3), and has her employer helping her keep her legal status alive by keeping the job functional on paper (4). With the Kafala system still being restricted, Myla has successfully navigated through the system to thrive in Jordan using her multiple and intersecting identities.

Conclusion

This research attempts to explore the experience of migrant workers with the Kafala system in the Hashemite Kingdom of Jordan, in particular the city of Amman. While there exist racial and gendered categories of which workers do which jobs and many migrant workers in Jordan are deprived of spatial and social mobility, there are cases of migrants strategically and effectively employing their multiple

and intersecting identities to navigate through the sponsorship system. There has been much research focusing on the restrictive and exploitative nature of the Kafala system so far, but at the same time, we still lack a substantial amount of research attempts that effectively delve into other aspects of the system where it can be beneficial for the migrant workers themselves. Regarding my research attempt, I would argue that the experience of migrant workers in Jordan varies greatly and are contingent on the intersectional nature of each and every migrant's multiple identities.

To further understand how intersectionality comes into play in the experience of migrant workers in Jordan, I have shown two case studies that expressed the varying experience among the migrant workers in Jordan. While Corazon was deprived of her fundamental rights such as spatial and social mobility, Myla thrived through the system. On one hand, the kafala system took a toll on Corazon's mobility in its restrictive and exploitative characteristics given the rampant confiscation of passports and personal items as well as the tricky nature of the work contract. On the other hand, the system appears to not have been "that strict" given how effectively Myla used her identities and connections to develop her own business without having to report the business to the authorities at all. This is to suggest that current research on the dynamic nature of the relationship between the kafala system and the social actors is still lacking, and the expectation of new research attempts will be much needed for a better understanding of the sponsorship system.

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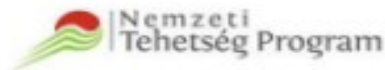
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MŰHELY / WORKSHOP

INVITATION TO THE VIRTUAL EXHIBITIONS
OF THE PROJECT „T.É.M.A.”



The 'T.É.M.A.: Tudományos És Művészeti Alkotóműhely' ("T.É.M.A.": Scientific and Artistic Workshop) is a talent development program of the Hungarian "Kocka Kör Tehetséggondozó Kulturális Egyesület" (Cube Circle Talent Development Cultural Association) for secondary school students. Supporters of this project are the Hungarian National Talent Program and the Hungarian Prime Minister's Office (project ID is NTP-INNOV-22-0095).

The "T.É.M.A." is a Hungarian acronym that meaning is:

T = Tudományos (Scientific)

É = és (and)

M = Művészeti (Artistic)

A = Alkotóműhely (Workshop)

The word "TÉMA" means "Topic" in Hungarian.

During the 2022/2023 school year, the topic of the project "T.É.M.A." is "sustainable development".

The themes of the 11 virtual exhibitions made by participants are:

1. The ecological footprint
2. Climate change
3. Plastic in the oceans
4. Environmentally friendly building materials
5. Eco houses

6. Deforestation
7. Conscious shopping
8. Environmental awareness and eco-efficiency of companies
9. Energy crisis
10. 3D printing today and in the future
11. Virtual exhibitions of the project "T.É.M.A."

Equipment required: computer with mouse and keyboard and internet connection

The virtual exhibitions are visitable on the website of the project:

https://kockakor.hu/ntp_innov_22_0095/

The language of these virtual exhibitions is Hungarian.

