Online ISSN : 2249-460X
Print ISSN : 0975-587X
DOI : 10.17406/GJHSS

# Global Journal

## of Human Social Sciences: C

# Sociology & Culture

The Lost Heritage of Koryoin

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Highlights

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Discovering Thoughts, Inventing Future

VOLUME 22 ISSUE 5 VERSION 1.0

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Global Journal of Human-Social Science: C
Sociology & Culture

Global Journal of Human-Social Science: C
Sociology & Culture

Volume 22 Issue 5 (Ver. 1.0)

Open Association of Research Society

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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460x & Print ISSN: 0975-587X

# The Unemploed of "Baby-Boomers" Generation in Contemporary Labour Market in Poland - Issues of Professional Insertion and Expectations towards Employers

By Rafal Muster

*University of Silesia in Katowice*

*Abstract-* The article attempts to characterize the unemployed belonging of the post-war baby boom generation, referred to as Baby-boomers' (born before 1965). Their problems of professional activation on the contemporary, dynamically changing labor market were presented. It turns out that despite, a significant reduction in the issue of unemployment on the domestic labor market, not all age groups of the unemployed are the beneficiaries of these favorable changes. What's more – the statistics indicate a deterioration of the situation of people over 55 on the labor market. In recent years, their share in the unemployment structure has increased threefold. The phenomenon of the "Baby-boomers" generation is not only described in the literature, but it is also object of scientific reflection. However, this problem is virtually unnoticeable in the public discourse. Rapid changes taking place in the internal and external environment of modern organizations (automation, robotization, Internet development) are factors making the eldest unemployed reintegration into the labor market even more difficult.

*Keywords: "baby-boomers" generation, unemployment, labor market, professional activation.*

*GJHSS-C Classification: DDC Code: 361.945 LCC Code: HC305*

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# The Unemploed of "Baby-Boomers" Generation in Contemporary Labour Market in Poland - Issues of Professional Insertion and Expectations towards Employers

Rafał Muster

*Abstract-* The article attempts to characterize the unemployed belonging of the post-war baby boom generation, referred to as Baby-boomers' (born before 1965). Their problems of professional activation on the contemporary, dynamically changing labor market were presented. It turns out that despite, a significant reduction in the issue of unemployment on the domestic labor market, not all age groups of the unemployed are the beneficiaries of these favorable changes. What's more – the statistics indicate a deterioration of the situation of people over 55 on the labor market. In recent years, their share in the unemployment structure has increased threefold. The phenomenon of the "Baby-boomers" generation is not only described in the literature, but it is also object of scientific reflection. However, this problem is virtually unnoticeable in the public discourse. Rapid changes taking place in the internal and external environment of modern organizations (automation, robotization, Internet development) are factors making the eldest unemployed reintegration into the labor market even more difficult. These changes may affect professional marginalization, but also the progressive social exclusion of people of retirement age. This is also confirmed by the results of empirical research cited in the article. In addition to paying attention to the problems of professional activation of the "Baby-boomers", the article also describes their expectations of potential employers. Demographic changes will limit the supply of labor resources (low fertility rate, aging), employers will increasingly be forced to reorient their employment strategies and more often employ the jobless from the "Baby-boomers" generation.

*Keywords: "baby-boomers" generation, unemployment, labor market, professional activation.*

## I. Introduction

Demographic processes related to society's aging shall influence the accessibility of workforce resources in our country to an ever greater extent. Demographic models clarity indicate considerable growth of the number of postproduction age individuals in our population, but also of the amount of those in pre-retirement age (compare Jóźwiak, 2013). The increase of the percentage of those in professionally immobile age (45-59 for women and 45-64 for men) in the population and particularly the growth in the number of individuals aged 55 and more alongside the increasing problems in obtaining employees shall lead to the necessity to redirect the employers' recruitment strategies for their vacancies. This shall result in more frequent hiring of employees in pre-retirement age also with the use of human resources reserves registered in regional labor agencies as unemployed.

Despite the considerable improvement of the situation in the domestic labor market observed in several last years, not all age groups of the unemployed benefit from these favorable changes. It is a fact that unemployment problem has been reduced significantly among those aged between 18 and 24. Still, simultaneously the percentage of those aged 55 and more in the unemployment structure has trebled. In the period between 2006 and 2021 the officially recorded unemployment rate was reduced from the level of 14.8% to 5.4% (www.gus.pl). In this period, the number of individuals officially registered as unemployed by regional labor agencies was reduced by 1 414 207 individuals (from the level of 2 309 410 to 895 203 unemployed). However, taking into consideration the age criterion of unemployed we may conclude that individuals aged above 55 do not benefit from the strong trend of unemployment reduction in Poland. Statistical data indicate a growing percentage of individuals belonging to this age group in the structure of registered unemployment. It has been determined that the presence of those aged 55 and more in the system of unemployed has nearly trebled – from 6.7% to 17,5% between 2006 and 2021. Simultaneously it needs to be stated that due to the process of society aging, the percentage of the population in old age shall grow systematically. As has been remarked by M. Zrałek: "Society aging constitutes a global phenomenon, but in Poland, it shall progress very dynamically (Zrałek, 2015: 201). Estimates of the Main Statistical Office (GUS) leave no room for speculations. The age median[1] for Polish population, which currently equals 41.9 years (respectively 43.6 for women and 40.3 for men), shall increase by nearly ten years, and in the year 2050 reached 52.5 – with 54.8 for females and 50.1 for males (compare GUS 2014: 127). Additionally, the percentage of individuals above 55 years of age in the population shall also grow from 31.2% to 47% (compare www.stat.gov.pl) - a fact that shall coincide with the

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[1] Age median – according the definition of MSO, defines the average age of individuals within a given social group (e.g., inhabiting a specific region). The median value determines the period that has been exceeded by half of the individuals belonging to a given society, and the other half has not reached yet (www.stat.gov.pl).



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systematic growth of the average lifespan. In 2050 the average lifespan for males shall equal 82.1 and for females 87.5 (compare Chomątkowska, Żarczyńska-Dobiesz, 2018: 37). Demographic trends indicate the growing availability of potential employees aged 55 or more (reach Kawka 2018: 117; Lewandowski, Rutkowski 2017: 11; Jamka 2009: 44; Chomątkowska, Żarczyńska-Dobiesz, 2018: 38). It is also worth noting the rapid aging of Europe's population. In 2018, the population of Baby-boomers numbered 150 million people, representing 22.2% of Europe's total population (Kaczmarek 2019).

The low level of professional activity of individuals belonging to this age group has been emphasised in the literature on the subject (Sadowska-Snarska, 2001), which is visible in the statistical data illustrating the economic activity indicators for various age groups. According to the calculations of the Main Statistical Office, the economic activity indicator[2] for Poles aged between 55 and 64 equalled 52.2 % in 2018 with 39.3% for females and 62.8% for males. The employment factor[3] for individuals of this age group reached 50.4% - with 38.5 % for females and 60.6% for males (GUS 2019: 110-113). Demographic changes connected with society's aging shall continue to influence the labor market to an ever-growing extent – particularly in the scope of workforce accessibility. The growing percentage of individuals in pre-retirement and retirement age with a simultaneous decline in the number of youngsters entering the labor market shall lead to redirecting of employers' recruitment strategies. At the same time a risk exists that in the face of a crisis, the amount of the unemployed aged above 55 manifesting difficulties with professional reintegration shall increase as well.

Unfortunately, the issue of unemployment has been practically ignored in the media discourse. The growing percentage of individuals above 55 has not been mentioned in the public debate.

Scientific literature has been emphasizing the problematic position of older citizens in the labor market connected with the high dynamics of changes occurring both inside and outside companies for years. "The status of the elderly has been diminishing with the occurrence of new technologies, professions and organizational solutions and also with the progress of common education and mass media which replaced older generations in providing the youth with knowledge on common achievements of the society" (Klimczuk, 2010: 135).

[2] Professional activity indicator signifies the percentage of professionally active individuals in a given category within the total amount of individuals in this category (www.stat.gov.pl).

[3] The employment factor is defined as the percentage of the employed within a given category in relations to the total number of individuals in this category (www.stat.gov.pl).

Grażyna Spytek-Bandurska has stressed three main groups of factors reducing the employment of older individuals. Firstly, the individual features have been mentioned (relatively low level of education, problems with adaptation to new conditions, poor health); secondly – work organization and new technologies (necessity to obtain new skills and qualifications, dynamic changes both in the internal and external surroundings of companies, fast pace of work) and thirdly, economic and social conditions (unemployment, age discrimination, family demand for appoitment of the elderly – e.g., connected with childcare) (Spytek-Bandurska, 2012: 92).

The problem of generation diversification of employees constitutes the subject of various studies and discussions (see, for example: Rogozińska-Pawełczyk, 2014, Wiktorowicz, Warwas, et al. 2016). One may also encounter the term of age management within an organization which relies on: the "realization of various activities which allow for more rational and effective management of human resources by companies thanks to taking into consideration various needs and abilities of employees belonging to different age groups" (Liwiński, Sztanderska, 2010: 3).

Generational diversification may also be referred to as the unemployed, particularly in the context of the presentation of professional insertion of representatives of various generations. However, in this area of research regarding the generation diversification of the unemployed, the lack of analysis is visible. Different needs, ambitions, or motives for seeking employment are manifested by the young entering the labor market and other by those nearing their retirement age.

The purpose of this article is constituted by the attempt to characterize the unemployed belonging to the oldest generation in the labor market – namely the "Baby-boomers"- particularly in the context of the feasibility of initiation of activities aimed at professional insertion in this age group. The hereby article also aims at depicting the expectations of this age group towards their potential employers. The latter is crucial due to the fact that such activities result in a humanization of work relations by emphasising the subjectivism of those without employment who possess specific expectations towards a workplace, which should also be taken into account by employers.

## II. "Baby Boomers" Generation – Characteristics Attempt

The term 'generation' was first used in academic discourse in the 19th century by the German philosopher Wilhelm Dilthey, who proposed the term 'humanist generation' as a group of people who live at the same time, are influenced by the same events, and



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through this have a similar perception of reality (Dolińska-Weryńska 2016).

A generation - as it has been emphasized in the literature on the subject on numerous occasions – is "a group of individuals born at approximately the same time, sharing common historical experiences. Based on of these similar, unique experiences, representatives of a given generation manifest certain similarities in their mode of operation and ideology which differentiates them both from the previous and subsequent generations" (Marschall, 2004: 240). A. Giddens, when defining the term of a generation stresses that fact that these are "(…) all individuals born and living in the same period. It is not only the year of birth that determines belonging to a given generation but also everyday experiences shaped by the specific society (Giddens 2012: 1084; see also Karmolińska-Jagodzik 2012: 191-193). J. Wiktorowicz and I. Warwas Focus their attention on similar issues when they describe a generation as "(…) all individuals belonging to a given culture group of more or less the same age characterized by similar attitudes, motivations, expectations, approach to the world and system of values stemming from their common historical and social situation" (Wiktorowicz, Warwas, 2016: 19). Thus the definitions of the term "generation" do not solely stress the time borderlines of the date of birth, but they also strongly emphasize the commonness of experiences resulting from the fact of having witnessed definite events and social and economic processes. It is also worth mentioning that, as remarked by R.Seweryn: "the scientific approach to a term of generation is relatively new" (Seweryn, 2017: 105). In Poland, the issue of generations - from the perspective of labor market functioning has only been the subject of empirical research for a few years (Kopertyńska, Kmiotek 2014:41). Simultaneously, the topics connected with generational diversification constitute a constantly more popular subject of scientific exploration – particularly in the aspect of presentation of specific manner of functioning of individuals of considerably different age groups. T. Kawka, when analyzing the term of generation from the perspective of the labor market, claims that "it is a group of individuals possessing similar social identity, professional goals, and values which join all these individuals into one coherent group. These people are characterized by a similar attitude to life that is to the place and importance of crucial aspects of life such as family, friendship, love, interests, or work itself. Every generation shapes their shared approach to authorities, organizations, autonomy, sense of freedom, belonging to groups and societies – including companies, expectations in the scope of obtaining motivation and reaching satisfaction from work." (Kawka, 2018: 123). At times the determination of specific borderline dates defining belonging to a given generation may prove difficult. As stated in the literature on the subject: "differentiation of generations remains the issue of the assumed pattern and in specific cases may arise doubts. Hence in the literature, one may encounter various classifications of generations which differ not only in the scope of names for individual generations but also the dates of birth defining a given generation." (Czerwińska, Striker, Wojtaszczyk, 2009: 118). Certain doubts and discussions concentrate mainly on the dates defining the categorization of the younger generations. Nevertheless, in case the Baby-boomers generation, there are no significant differences in the definition of the time determining belonging to this age category. It is commonly assumed that individuals born within the period of twenty years following the end of the II World War, which is in the period between 1946 and 1964, belong to this generation. However, when studying literature we may encounter various terms used to describe the representatives of this generation, such as Mc Generation, Baboo, Love Generation, Sandwich Generation and Woodstock Generation (Seweryn, 2017: 106). Still, the term "Baby Boomers" is the most frequently used description of those born between 1946 and 1964, and that is why this same term is used in the hereby article (see: Howard et al. 2008; Cromartie, Nelson, 2009; Seweryn 2017; Bejtkovský 2016; Zhang 2019; Leach et al., 2013: 2).

Individuals born in the period of the post-war demographic peak were socialized for work in the conditions of the socialist, centrally managed labor market. Representatives of the Baby- boomers generation began their professional careers in the 1970s and 1980s. Those entering labor market in the period of the People's Republic of Poland possessed a high sense of professional stability, job security, and a high social benefits – also for their family members. As observed by R. Drozdowski, "Amongst all specific features of the real-socialist labor market the rule of full employment, as well as the rule of state ownership of production means always possessed a privileged status" (Drozdowski, 2002: 51).

The political and economic transformation that commenced at the end of the 1980s altered the rules of functioning of employees in the labor market completely. A certain number of these individuals lost their jobs mostly due to restructuring processes and very frequently subsequently experienced difficulties with re-entering the labour market. Currently unemployed representatives of the Baby-boomers generation gained their professional experience before 1989. This fact proved to be a stigmatizing factor for employees in the eyes of some employers, mainly in the 1990s.

Entrepreneurs perceived habits gained by employees in the conditions of socialist labor market negatively, and this hindered reintegration with the labor market for those who had lost their jobs as a consequence of restructuring processes.



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What is essential, representatives of the Baby Boomers generation possess numerous advantages in comparison to individuals belonging in younger generations, and these advantages should be viewed positively by employers. The Baby Boomers are generally unwilling to change their jobs. They respect their superiors, remain loyal to their co-workers and employers, and usually feel good in hierarchic structures with clear management rules. Simultaneously individuals of this age group expect stability and job security (see: Kim 2021: 156; Wiktorowicz, Warwas, 2016: 27-28). The Baby-boomers generation perceives career success through the lens of hard work leading to a set goal (Opalińska 2018: 144).

Unfortunately, despite of their multiple virtues crucial from the perspective of an employer, the literature on the subject places great emphasis on the fact that in case of losing their jobs, the older candidates encounter particularly significant obstacles in obtaining proper employment (Muster, 2019:29). Despite the statutory prohibition of among others age discrimination[4] in the recruitment process, studies indicate the disfavouring such individuals in the recruitment process and in the course of selection for vacancies (compare e.g., Muster, 2010a, 2014).

The literature emphasises that „Older job applicants (aged 50 and older), are treated diferently than younger applicants. A younger worker is more than 40% more likely to be called back for an interview compared to an older worker" (Axelrad et al., 2018: 2).

The latter is to a considerable extent, connected with a lower level of spatial mobility – in comparison with younger age groups of employees. As stressed by Elzbieta Krysńka: "individuals belonging to older age groups are predominantly characterized by low mobility (professional, educational, spatial and intercompany), which results in their reduced ability to respond flexibly to changes occurring in modern economies and contemporary labor markets" (Kryńska, 2012:14-15). Representatives of the older generation are particularly at risk of digital exclusion (compare Kryńska, Arendt, 2010, Muster 2010b). Moreover, as the age of those unemployed progresses their activity in job search diminishes (compare Chirkowska-Smolak, 2000: 150). The Human Capital Balance also hints at an advanced age as one of the critical barriers hindering employment by the unemployed (Turek, 2013: 85).

The rapid changes in the internal and external environment of organizations (legal, organisational, technological changes) may constitute factors of professional marginalization and social exclusion of persons from the Baby-boomers generation. Without additional institutional support in the professional reintegration of the Baby Boomers representatives, their problems with effective entry into the labor market will intensify. Recognition of the needs of this group of unemployed will allow a better definition of the catalogue of activities supporting them on the labour market (see: Muster 2022: 16).

Generations are internally differentiated, and it is not possible to attribute the same characteristics to all representatives of a generation. However, in an attempt to make some generalization from a labour market perspective, it can be said that people from the Baby-boomers generation are characterized by a high level of loyalty to employers and colleagues. They are reluctant to change jobs, are stability-oriented, and feel comfortable in a hierarchical organisational structure. Representatives of this generation have a lower level of education compared to younger generations. Their weakness is the use of modern information technologies.

## III. Methodology of Research

Public employment services of the city of Ruda Śląska (industrial city in Poland) realized multi-dimensional research on the issue of generation diversification of human resources in the local labour market in the period between July and September 2017. The said research was conducted among the unemployed, the employed, and employers[5]. The article hereby provides a detailed analysis of the results of the research conducted among the unemployed with a particular focus on the eldest group of respondents classified as Baby-boomers.

In the course of research into the issue of generational diversification of the unemployed initiated by the District Employment Agency in Ruda Śląska, an attempt was made to answer numerous research problems – mainly those related to professional activation.

At the stage of sample selection, the unemployed were divided according to their age diversification into four main age groups (compare:

[4] For instance, we may list the following legal acts: Article 32, section 2 of the Constitution of the Republic of Poland, which states that: "No one shall be discriminated in political, social or economic life for whatever reason"; art. $11^3$ of the Labour Code says that: "Any discrimination in employment, either direct or indirect, particularly connected with sex, age, disability, race, religion, nationality, political views, trade union membership, ethnic origin, beliefs, sexual orientation, definite or indefinite period of employment - is unacceptable"; and article 36 section 4 point 3 of Employment Promotion Act and Labour Market Institutions stipulates that employment assistance services for the unemployed and those searching for employment and for employers provided by the district and regional employment agencies shall be free of charge in compliance with the rule of equality without any form of discrimination, among others related to age".

[5] The author of this article held the position of the head of research. The research was conducted among the unemployed (N=430, standardized interview technique), the employed (N=310, standardized survey technique), and employers (N=28, three integrated focus interviews).



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Warwas, Wiktorowicz, 2016): those born before 1965 (The baby-boomers generation), those born in the period between 1965 and 1979 (generation "X"), individuals born in the period between 1980-1989 (generation "Y") and finally those born after 1989 (generation "Z"). Nowadays, representatives of four generations co-exist in the labor market: Baby-boomers, X, Y, and Z (Zaleśna 2018: 46).

For each age category, a separate representative research group was selected according to the rules of quota sampling. For the needs of research group selection, the following variables were taken into consideration: age, sex, level of education, and period of unemployment. Based on the standardized interview technique, 430 unemployed were interviewed, including 99 representatives of the baby-boomers generation. In the course of this research, a standardized interview form was used containing 37 questions and a personal data section. The majority of questions were of closed or semi-open type. Certain questions were formulated in the form of charts. The unemployed provided their answers to the survey questions when visiting the offices of the District Employment Agency in Ruda Śląska.

The researched issues were focused on the following themes: a reason for registering at the district employment agency, the importance of work in a personal system of values, opinions on the advantages of the labor market, level of civilizational competencies, methods of searching for employment, plans for professional development, expectations towards employers.

Thanks to this approach, a detailed portrait of four generationally diversified groups of the unemployed was created, a picture of applicational value and potential to be used in the practice of human resources activation conducted by both the public and commercial employment agencies. Additionally, results of research conducted among the unemployed constitute a valuable source of information for employers because the unemployed were providing precise answers regarding the fundamental aspects of work relationships from their perspective, also in the element of the creation of the desired motivation system.

*Social and Demographic Features of Studied Unemployed Representatives of Baby Boomers Generation*

A total number of 430 inhabitants of Ruda Śląska participated in the study, all of whom possessed the status of an undeployed in the period when the study was conducted (August - September 2017), including 99 representatives of the baby-boomers generation (those born before 1965). Due to a large number of the selected sample of representatives of the eldest generation of the unemployed (N=99), the absolute numbers calculated into percentages provided the same value. Hence solely, percentage values have been used in the article.

The social and demographic analysis of individuals who participated in the research realized by public employment agencies in the city of Ruda Śląska was conducted based on the following data: sex, level of education, and period of remaining unemployed. The sample selected for this research was of quote character. It accounted for the actual social and demographic structure of the unemployed born before 1965 and registered at the District Employment Agency in Ruda Śląska. Taking into consideration the sex of respondents, 52.5 of the representatives of this generation were females. The percentage of males in the selected group equaled 45.5, but 2% of respondents failed to provide information concerning their sex. Another crucial variable diversifying the studied population is the level of education (Table 1).

*Table 1:* Level of education of the unemployed representatives of Baby-boomers generation participating in the research

| Education level | % |
|---|---|
| Incomplete primary education/ incomplete lower secondary | 4.0 |
| Primary/lower secondary | 22.2 |
| Basic vocational | 43.5 |
| Secondary general education | 8.1 |
| Secondary vocational education | 15.2 |
| Post- secondary education | 3.0 |
| Higher vocational education | 2.0 |
| Higher engineering education | 2.0 |
| Total | 100.0 |

*Source: Research of DEA Ruda Śląska. Own calculations.*

In the sample group which reflects the actual demographic structure of representatives of the baby-boomers generation in the local labor market in Ruda Śląska, individuals possessing primary vocational education constituted the largest group (43.5%) followed by those with primary or lower secondary education (22.2%). Thus we may conclude that nearly 70% of the studied unemployed representatives of Baby



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boomers generation possessed at least primary vocational education. The percentage of individuals with general and vocational secondary education reached respectively 8.1% and 15.2%. Among the research group, there were also specific individuals with post-secondary (3%) and higher (4%) education. The following Table (no 2) presents the division of respondents due to their actual period of remaining unemployed.

*Table 2:* Period of remaining unemployed of studied representatives of Baby-boomers generation

| Period of remaining unemployed | % |
|---|---|
| Less than 3 months | 12.1 |
| From 3 to 6 months | 23.2 |
| From 7 to 12 months | 10.1 |
| From one to two years | 13.1 |
| From three to four years | 7.1 |
| More than four years | 33.4 |
| Not stated | 1.0 |
| Total | 100.0 |

*Source: Research of DEA Ruda Śląska. Own calculations.*

When analyzing the answers provided by respondents, we may notice the dominating position of the long-term unemployed representatives of the baby-boomers generation. They have been without employment for at least one year (53.6%). Moreover, we need to stress that every third individual among representatives of this age group (i.e., 33.4%) has been unemployed for longer than four years. In the personal data section of the survey, respondents were asked about a diagnosed assistance profile – detailed findings have been gathered in Table 3.

*Table 3:* Assigned assistance profile of unemployed respondents representing the baby-boomers generation

| Assistance profile | N | % |
|---|---|---|
| I | 2 | 2.0 |
| II | 39 | 39.4 |
| III | 37 | 37.4 |
| No profile | 19 | 19.2 |
| Not stated | 2 | 2.0 |
| Total | 99 | 100.0 |

*Source: Research of DEA Ruda Śląska. Own calculations.*

Public employment agencies have been profiling the unemployed for five years (2014-2019) based on methodological assumptions[6] recommended by the Ministry of Labour and Social Policy. The unemployed were providing answers to standardized survey questions focused on their motivation and readiness to undertake employment, and also on the competencies they possessed. Subsequently, a computer application assigned the unemployed to one of the three profiles, which resulted in offering them specific services and instruments of professional insertion.

Individuals assigned to profile I due to their high level of motivation to commence work, their proactivity, and mobility, as well as possessed qualifications are adjusted to the needs of the labor market and ready to begin work. Those assigned to profile II are moderately estranged from the labour market. They possess qualifications which rarely coincide with employers' expectations, and they lack impulses motivating them to search for employment. Finally, individuals assigned to the III assistance profile have wholly lost motivation to search for and start work or consciously avoid these activities for fear of losing social benefits. The unemployed with this profile frequently do not possess professional qualifications (compare Profiling Assistance for the Unemployed, 2014: 14-24).

As depicted by the conducted analysis, individuals assigned to the I profile of assistance

[6] Constitutional Tribunal, in the verdict of the 6th of June 2018, ruled that the rules of profiling the unemployed were not compliant with the Constitution. Formally, profiling was abandoned in June 2018. The following institutions have voiced their critical opinion of profiling: The Ombudsman, Supreme Chamber of Control but also district employment agencies. Those critical remarks included, among others: excessive bureaucracy when initiating the profiling procedure or limitation of the possibility to benefit from the statutory services and instruments of proactive labor market policy for those assigned to profile III or the unemployed withdrawn from the labor market. However, beacouse the studies among the unemployed inhabitants of the city of Ruda Ślaska were conducted in 2017 – that is in the period when employees of district employment agencies performed tasks related to profiling this article includes information on the classification of respondents into the diagnosed profiles treating this information as a significant variable diversifying the studied population. The profiling of the unemployed influenced the undertaking of different job activation depending on the profile.



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constituted a tiny percentage (2%) of respondents. The amounts of unemployed posted to the II and III profiles were at a similar level equalling respectively 39.4% and 37.45. One in five respondents (19.2%) had no diagnosed profile at the time of performance of this research, and 2% failed to provide any answer regarding their diagnosed profile.

Thus in the case of the baby-boomers generation – if we consider the assigned profile of assistance – individuals with the most favorable situation from the perspective of obtaining employment constituted the smallest group; solely 2% of respondents had been given to the first profile.

*Motives for Obtaining Status of an Unemployed Declared by Representatives of Baby-Boomers Generation and their Potential Participation in Professional Insertion Activities*

The unemployed who participated in the research were asked about the most important reasons for registering in the District Employment Agency. The analysis of the gathered research material has proven that the leading cause listed by the respondents was health insurance (62.6%), followed by expected assistance of public employment services in obtaining work (51.5%) – Table 4.

*Table 4:* Motives for obtaining the status of an unemployed listed by representatives of the baby-boomers generation (in %)

| Responses | % |
|---|---|
| Health insurance | 62.6 |
| Assistance of the agency in finding a job | 51.5 |
| Entitlement to unemployment benefit | 16.2 |
| Use of services of professional advisers | 16.2 |
| Social care benefits | 15.2 |
| Willingness to participate in trainings | 10.1 |
| Agency assistance in obtaining paid internship | 5.0 |
| Obtaining funds for commencing own business | 1.0 |

*Significant: respondents could have selected the maximum number of 3 answers.*
*Source: Research of DEA Ruda Śląska. Own calculations*

Generally speaking, the motives for registering at the district employment agency may be divided into two main categories. The first category is connected with the model of active labor market policy. It relates to the willingness to use the services and instruments of this market – such as employment agencies, professional counselling, or other subsidized forms of support. The other category is related to the passive policy model and focuses on activities connected with benefiting from social transfers (benefits, insurance). As shown by the analysis of the gathered empiric material, respondents from the baby-boomers generation more frequently listed reasons connected with the passive labor market policy model as their motives for obtaining the status of an unemployed. This attitude – more passive and reluctant in the aspect of potential functioning in the labor market shall constitute a severe hindrance to their professional reintegration. Most probably, this attitude results from their previous, inefficient attempts of professional insertion or unfavorable relations with employers which might have led to their reluctant approach to search for employment and drive these individuals to withdraw from the labor market.

Representatives of the baby-boomers generation declaring their willingness to search for employment listed the Internet as a source of information on job offers most frequently. However, solely 42.3% of those expressing their desire to find work have listed the virtual space as the space to look for job offers. The other respondents mentioned "traditional" forms of job-seeking such as: press advertisements (38.5%), district employment agency (32.7%), acquaintances (32.7%), but their other responses also included personal visits to companies (30.8%), and sending CVs to potential employers (28.8%). Only 3.8% of respondents mentioned private employment agencies as a sources of information concerning possible job offers. The research has also shown that respondents representing the baby-boomers generation are practically not interested in starting their own business – only 3 % consider such an option.

In course of identification of factors influencing remaining unemployed (Table 5), respondents most often mentioned issues related to their advanced age (60.6%). Other reasons included poor health (40.1%), lack of proper qualifications (20.1%), and too long a period without employment (15.1%) (Muster, 2022).



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*Table 5:* Factors contributing to remaining unemployed according to the unemployed representatives of Baby-boomers generation (in %)

| Responses | % |
|---|---|
| Advanced age | 60.6 |
| Poor health | 40.1 |
| Lack of proper education | 20.1 |
| Too long period of unemployment | 15.1 |
| Lack of proper job offers | 14.1 |
| Lack of experience | 8.1 |
| Lack of availability | 5.1 |
| Childcare | 2.0 |

*Significant: respondents could have selected the maximum number of 3 answers.*
*Source: Research of DEA Ruda Śląska. Own calculations*

Simultaneously – a fact that requires emphasizing – the conducted research has proven that every fourth unemployed representative of "Baby-boomers" generation had resigned from commencing work within a year preceding the realization of the said research. The main listed factors contributing to the resignation from job included: low salaries (17%), hard work (15%), too long distance to commute (11%), inappropriate working hours/too long working hours (11%), wrong opinion on the employer (7.1%), lack of opportunities for professional development (6.1%), lack of perspectives for stability (5.1%) (Muster, 2022).

The unemployed participating in the research listed their critical advantages from the labor market perspective. The analysis of the gathered research material had indicated that respondents belonging to the Baby-boomers generation (those born before 1965) mentioned the following features as their critical assets: professional experience, willingness to work hard, punctuality, timeliness, diligence and precisions as well as communicativeness, and flexibility. Thus in the opinions of the eldest group of unemployed, their advantages are largely focused mainly on the notion of work ethic. However, when identifying their strengths, this group of respondents has not mentioned any skills related to their ability to use advanced technologies, especially in the scope of information technology. This is connected with the fact that, as has been shown by the performed research – only a tiny proportion of this group of unemployed is computer literate (32.3%) or able to use the Internet (36.4%). The apparent deficit in civilizational competencies connected with operating computers or functioning in virtual space implies a problem of digital exclusion of the unemployed representatives of the Baby-boomers generation. Undoubtedly, dynamic development of technology, automation, and robotization have all led to the change of competencies desired by employers in the contemporary labor market. Moreover, the revolutionary expansion of the Internet, changes in the methods of transferring and searching for information have resulted in the transfer of job offers into the virtual space as well. Lack of civilizational competencies in the scope of the search for information on vacancies as well as the deficit of skills adjusted to the transformation of the labor market may lead to the petrification of the unemployment structure and intensification of problems related to the effective professional insertion of the unemployed belonging to "Baby-boomers" generation. The latter is especially disturbing as 13.1% of respondents representing this generation declared willingness to improve their qualifications during the following year.

*Expectations of the Unemployed Representatives of the "Baby-Boomers" Generation toward Employers*

The partnership between the labor supply and employers within the labor market should rely on the analyzing the needs of the unemployed – particularly in the context of their expectations towards the potential workplace or desired motivation instilling factors. However, it may be concluded that these types of activity, namely those related to the analysis of expectations of both the unemployed and employed towards employers, are still missing in the current labor market. Despite the significant decline in the problem of registered unemployment, employers still constitute the dominating party within the labor market space, and the statement that we are dealing with the employee's need is not reflected in practice.

The studied unemployed representing the "Baby-boomers" generation (i.e., individuals born before 1965) mentioned factors that are particularly unfavorable for them in searching for a potential employer. Two responses among those listed in the proposed cafeteria list were selected most frequently: proximity of the place of living (65.4%) and the possibility of obtaining a regular contract of employment (63.5%). Surprisingly, good financial conditions were ranked as the third most important factor (40.4% of responses) (Muster, 2022) – see Table 6.



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The analysis of the collected research material has shown that the unemployed representatives of the "Baby- boomers" generation expected their net salary for full-time employment with the regular contract of work to reach the level of 1200-1600 PLN (260-348 USD) (38.5%) or of 1601-2000 PLN (349-434 USD). The higher range of expected salary was selected much less frequently. Amounts from 2001 to 2400 PLN (435-521 USD) and above 2400 PLN (521 USD) were mentioned respectively by 15.4% and 9.6 % of respondents.

*Table 6:* Factors of particular importance for the unemployed Baby-boomers when searching for employment (in %)

| Responses | % |
|---|---|
| Proximity to the place of residence | 65.4 |
| Possibility of obtaining contract of employment | 63.5 |
| Good financial conditions | 40.4 |
| Proper working hours | 32.7 |
| Good company image | 19.2 |
| Opportunities for promotion | 5.8 |
| Additional social benefits | 5.8 |
| Possibility of obtaining a company car | 0.0 |

*Significant: respondents could have selected the maximum number of 3 answers.*
*Source: Research of DEA Ruda Śląska. Own calculations*

During the analysis of expectations of the unemployed towards potential employers, the former were questioned about expected material (Table 7) and non-material factors (Table 8) of their motivation. The fact that the most desirable factor of material motivation is the one related to a potential increase in the basic salary is hardly a surprise. A pay rise is permanent and does not depend on subsequent performance of employees. On the other hand, in the analysis of financial expectations, it was concluded that the unemployed representatives of this age group do not manifest high material aspirations – 75% of respondents were willing to be satisfied with the net amount of 2000 PLN (434 USD) for their full-time employment. It should be noted that the research was conducted in 2017. Currently (2022), the lowest salary for a job in Poland is PLN 3010 (USD 654).

*Table 7:* Factors of material motivation of particular importance to the studied unemployed (in %)

| Responses | % |
|---|---|
| Grant a higher basic salary | 75,8 |
| Grant higher performance bonuses | 39,4 |
| Finance insurance system and pension programme | 37,4 |
| Finance medical care | 34,4 |
| Finance holidays | 9,1 |
| Fund scholarships for children of the best employees | 5,1 |
| Grant low-interest loans | 5,1 |
| Allow participation in company's profit | 5,1 |
| Provide with a company car | 4,0 |
| Organise trainings and conferences for employees | 4,0 |
| Distribute part of company's shares free of charge | 3,0 |

*Source: Research of DEA Ruda Śląska. Own calculations.*
*Significant: respondents could have selected the maximum number of 3 answers.*

A fact that should be stressed here is the relatively frequently mentioned expectations towards the employer to finance medical care (34.4%) and the insurance system and pension plan (37.4%). Respondents belonging to the eldest age group expect easy access to medical services to be funded by their potential employers. What is more, the issue related to expected financing of the insurance program and retirement plan by employers were also frequently mentioned.

Apart from material impulses, employers should also use non-material factors (Table 8) based on a wide



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range of potential activities. Thanks to the application of both material and non-material impulses for motivation adjusted to the needs of the workforce, strengthening of employees' loyalty towards employers shall be enhanced (Muster, 2022). This should translate into a reduction in personnel fluctuation and increase the level of employees identification with their workplace.

*Table 8:* Non-material motivation factors of particular importance for the studied unemployed (in %)

| Responses | % |
|---|---|
| Civil and respectful treatment of employees | 75.8 |
| Opportunities for promotion | 36.4 |
| Frequently praise employees and appreciate their knowledge | 36.4 |
| Allow employees to organise work themselves | 31.3 |
| Warnings and reprimands for careless workers | 9.1 |
| Sense of stability and job security | 7.1 |
| Efficient channels of communication with management | 6.1 |
| Assigning more complicated tasks to employees | 4.0 |
| Systematic evaluation of performed work | 3.0 |
| Increase participation of employees in company management | 2.0 |
| Build awareness of being employed by a renowned company | 1.0 |

*Source: Research of DEA Ruda Śląska. Own calculations.*
*Significant: respondents could have selected the maximum number of 3 answers.*

The unemployed who participated in the research most often listed civil and respectful treatment of employees in the course of identification of the most desirable factors of non-material motivation. The majority of respondents expect respectful treatment from their direct superiors. Such distribution of responses may also indicate to a deficit of this type of behavior manifested by the managerial personnel in former workplaces. On the other hand, respondents proved to be practically uninterested in increasing their share in company management or in developing their conviction of being employed in a renowned, prestigious company.

## IV. Conclusion

The situation of the unemployed representatives of the "Baby-boomers" generation in the labor market is becoming increasingly more difficult. The change in labour market status from active to unemployed is particularly acute for people who have been economically active for a long time. It is necessary to stress that despite a considerable reduction in the level of unemployment in Poland, not all age groups have benefited from this trend. The most significant decline in the percentage of unemployed individuals has been observed among younger generations. Sadly, the portion of the eldest unemployed has nearly trebled in the unemployment structure. Currently almost every fifth individual remaining unemployed, according to official statistics, is 55 years old or older. Under to binding legal regulations, the unemployed of this age group are classified as those in a specific position in the labor market (article 49 of The Promotion of Employment Act.). Thanks to this, they benefit from various instruments of the proactive labor market. However, what is missing is comprehensive, system of support for the elderly in the area of activities aimed at their effective reintegration into the labor market. Programs initiated so far by the legislator, which should have provided benefits for individuals of pre-retirement age returning to the labor market, have failed to fulfill their role.

Local institutions do manifest a certain levels of initiative in the scope of initiation of activities aimed at the professional insertion of the eldest unemployed (e.g., state employment agencies, non-governmental organizations) but more often than not the territory covered by such projects is somewhat limited and such is the number of beneficiaries.

Additionally, dynamic changes occurring in the labor market, particularly those related to the implementation of up-to-date modern technological solutions may constitute another factor hindering effective professional insertion of representatives of the "Baby-boomers" generation. These individuals very frequently experience the problem of digital exclusion (Muster, 2010), but they also find it harder to adapt to changes occurring both in the internal and external surroundings of companies than the younger generations. The technological modifications determine a definite level and type of competences required from the potential candidates in a particular way. This fact may constitute a reason for disfavouring of the elderly by potential employees. Low level of civilizational competencies of the unemployed representatives of the "Baby-boomers" generation shall adversely influence



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their position in the labor market to an even more significant extent.

Another aspect discouraging employers from hiring individuals of pre-retirement age, is the stereotype of older employees as those who require sick leaves more frequently. Individuals belonging to younger generations obtain sick leaves much more regularly – this is visible in the statistical data (compare Karczewicz, Sikora, 2019: 28).

Thus the statement that without additional, comprehensive support in the scope of professional reintegration of the unemployed in preretirement age it is hard to talk about their effective professional insertion seems entirely justified.

However, it can be assumed that due to the demographic changes resulting in a decrease in labor supply (low birth rate, aging population), employers will increasingly be forced to reorient their recruitment strategies and also employ unemployed representatives of the "Baby-boomers" generation.

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www.gus.pl [date of access 25.07.2022]



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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460X & Print ISSN: 0975-587X

# Digital Media and Culture Wars: The Wi Spa Case

By Vitor Augusto Larrosa Hatje

*Abstract-* This article aims to understand the role that digital media play in the culture wars framework. To this end, a theoretical discussion of the notion of digital media and culture wars is conducted, pointing to impactful aspects of both, which will be perceived in a qualitative case study - the 2021 Wi Spa Confrontation - comparing Fox News, The Washington Post and The Guardian, as well as general positionings on Twitter. The conclusion is that digital media proves itself to be a central battleground in the conflict between discourses and meanings that are central to the culture wars, with the deeper moral debate surfacing only briefly, fueling the apparent dispute without dissolving the polarization.

*Keywords:* *digital media. culture wars.*

*GJHSS-C Classification:* *DDC Code: 306.487 LCC Code: GV1469.17*

*Strictly as per the compliance and regulations of:*

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## I. Introduction

With Brexit and the election of Donald Trump, not only fake news were popularized, but also the notion that Western societies are at a historical crossroads, with one perspective in particular highlighting, even if often in the margins of the debate, its encroachment in the culture wars. Succinctly, this notion reflects a deep conflictual division in society, which transplants itself to multiple social institutions and ultimately transfigures into general disputes over the control of meanings and discourses in the public sphere. In contemporary circumstances, it seems to connect closely with digital media, which I understand here as a globalizing term that summarizes the Internet-centric digital environment, thus encompassing the various forms of social media and online news networks - the new public square. In view of its growing stature and effective social function, the question arises: what role does digital media play in the context of the culture wars?

In other words, what is sought is to understand how digital media fit into the framework of the culture wars. Two goals are derived from this, namely, to understand theoretically what both concepts bring to the debate, and then to understand their relationship in practice from a specific case, thus dealing with the academic inquiry whether such a conflict actually has precedence. Along the same lines, it should be made clear that the concern here is not with the source of causality of the culture wars and whether digital media has an impact on their occurrence, but whether they are involved in the battles of the former and how this occurs. Aligned to this, the hypothesis is that digital media are a crucial confrontational field for the central conflicting element of the culture wars, the clash between discourses/narratives and meanings, which is directly reflected by news coverage and public stances on social media.

In its theoretical part, the work relies on a historically minded review of the concepts that shape the overarching hypothesis, thus generating an analytical portrait for subsequent application. Laudan's (1977) meta-theory is also used as a guide, which states that the main purpose of science is to acquire greater explanatory power in relation to reality, regardless of strict adherence to a paradigm. The maintenance of clarity as to definitions and concepts is the precondition for such interfacing between distinct strands of thought to be fruitful. Armed with this understanding, the case study of the Wi Spa (June through September 2021) is made possible, which is a qualitative comparative analysis of the content published by Fox News, The Washington Post and The Guardian between June 27 and September 10, as well as the general reactions and positions within the Twitter platform. This narrow cut-off in the broad picture of the topic is justified due to its social impact on the collective consciousness as defined by Durkheim (1997), seeing the episode is exponentially magnified by digital media, thus being a brazen example of the dynamics that the paper sets out to understand.

This article is socially important because it deals with a joint theme that is increasingly embedded in the social fabric, with an entire generation of people being politically socialized with full immersion in digital media and the cultural disputes that are exacerbated by its multiple forums. At the academic level, it seeks to provide a synthetic basis for the debate on the relationship between media and polarization more generally, with the most relevant and properly original facet of the empirical analysis being its comparative effort between select traditional media and social media. The structure of the article is divided into two main parts, the first focusing on the theoretical review and the second on the empirical study. Both are then subdivided into sections: the first part has two, one dealing with digital media and the other with the culture wars; the second part begins with an outline of the specific case, then moves on to the particular coverage by Fox News, The Washington Post and The Guardian, and finally the general reactions and positions perceived on Twitter.

## II. Digital Media and Culture Wars

As highlighted earlier, digital media is a globalizing term that serves to summarize the digital environment provided by computers and exponentially

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expanded by the Internet. While Hayles (2012) employs it in McLuhan's sense as a *medium*, thus aiming to treat it as fundamentally altering social relations that are anchored in its content (message), in this article it is employed only to refer to the essentially public space that is composed of the various forms of social media and news networks. This choice is explained by the fact that the focus of the article is not to explore the causality between both factors, although it is recognized that the changes that accompany the popularization of the Internet certainly alter the function attached to the media. In the following section, a brief exposition of the relevant topics is made, starting from social media to implications for mediated communication in general.

*a) Digital Media*

As Geertz (1973, p.5) expresses it, "man is an animal suspended in webs of significance he himself has spun". On a whole, humanity couples itself with symbolic forms to be transmitted to other individuals through the use of a technical medium - a material substrate that enables mediated communication. One can distinguish several attributes that differentiate media, such as their fixation (temporal longevity - mode of storing information), and their reproduction (spatial extension - capacity for multiplication) - space-time distanciation. Reproduction is essential to the success of their commercial exploitation - the commodification of symbols (THOMPSON, 1995). Digital media and the Internet as a whole have reached a new level among these aspects, with special attention being paid to the variations subsumed by the notion of social media.

Social media are "a group of Internet-based applications that build on the ideological and technological foundations of Web 2.0, and that allow the creation and exchange of user-generated content" (KAPLAN, HAENLEIN, 2010, p.60). Web 2.0 represents a transformation of the online environment in which services have gone from offering only communication channels to becoming interactive, bidirectional vehicles for networked sociality, with users generating content rather than just consuming it, platforms oriented to the lay user experience - with simpler interfaces -, and interoperability across devices (BLANK, REISDORF, 2012). Thus, as Dijck (2012) explores, social media forms a new social layer in the online domain, through which people organize their lives and socialize.

With the encoding of information (data) generated by people into algorithms, network connectivity has quickly evolved into a valuable resource as they create an online sociality personalized to each user, monetizing the internet akin to a marketplace from this personal and network traffic data - a byproduct of making connections and staying connected. As Berry (2011, p.4) points out, as this software increasingly structures the world, "it also withdraws, and it becomes harder and harder for us to focus on as it is embedded, hidden, off-shored and merely forgotten about", as it increasingly quantifies our social and everyday lives - they begin to engineer our desires and "choices" rather than just discovering our needs. That is, platforms come to influence human interaction on an individual and community level, permeating through the fibers of culture on a broader social level as online and offline worlds increasingly interpenetrate, with the former gaining ends in itself for people, such as escape from everyday annoyances, or as a precondition for participation in certain social circles (TURKLE, 2011; DIJCK, 2012).

Social media and technologies such as smartphones have not only facilitated networked activities, they have constituted and matured as part of everyday social practices, with this mediated sociality becoming an essential element of the social fabric (DIJCK, 2012). What we have today is the normalization of social networks, of their culture of personal openness and masked collection of this data for commercial purposes, as demonstrated by their global acceptance and centrality in the habits of an ever-increasing number of users.[1] Any "norm" in this sense necessarily ends up being part of a larger culture, which Cohen suggests, in the same vein as Geertz,

> …is not a fixed collection of texts and practices, but rather an emergent, historically and materially contingent process through which understandings of self and society are formed and reformed [...]. The process of culture is shaped by the self-interested actions of powerful institutional actors, by the everyday practices of individuals and communities, and by ways of understanding and describing the world that have complex histories of their own. (COHEN, 2012, p.17).

As Dijck (2012) continues, social media and its culture of connectivity are guided by some characteristics: centrality of code and algorithms in human connections and interactions; from this, imposition of an economicist logic, which pressures competitiveness through rankings and the principle of popularity - followers, likes, shares; nebulous boundary between private, corporate, and public spheres, favoring the decrease of the latter in practice, even if not in appearance, since the standard conduct of platforms is to exempt themselves from responsibility over the content that circulate on them.

Thus, one can summarize the commercial structure of the web as dominated by gigantic corporations that act in a monopolistic way, with partnerships among themselves to help in the computation of all possible information about people, in order to keep users connected as long as possible, with high traffic to their platforms. The most important tool in this sense are the algorithms, which are codes to

[1] At the very least, one can cite that about 62.5% of the world population uses the Internet, with social networks having around 4.62 billion users by 2022 (cf. DIGITAL REPORT, 2022).

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assimilate patterns, of outstanding utility in personalizing the content that each user will find online, facilitating their search and consumption, as well as the recommendation of news and targeted advertisements. They are like a "black box", collecting data and not revealing how they organize and use it, leading to demands for their accountability and transparency regarding the social effects caused (reiteration of biases), which vary greatly due to their high scalability and learning (PASQUALE, 2015; O'NEIL, 2016).

Aiming at our theme, it is more worthwhile to highlight here the immense risk, even if unintentionally - as among these other non-premeditated consequences - of algorithmic personalization creating a media and information environment conditioned to our preferences, generating an echo chamber that reinforces users' pre-established convictions, thus aggravating the existing political abysm in society (BAIL et al., 2018). As Baldi (2018) emphasizes, they reinforce the psychological (collective acceptance) and cultural specificities of each internet user's identity niches, creating clusters isolated and polarized among themselves.

The importance of this overview was guided by the fact that, at the very least, the development of social media has kept pace with the transformation of the public sphere of liberal democracies into a dissonant, fragmented, and noisy space of political communication. With this new media space, the traditional top-down flow of information - the definition of the public agenda by political elites and the media - is broken, and a de-professionalization of journalists is generated, since they lose their role as guardians of the public debate when people can interact directly through the Internet, exchanging user-generated content. Moreover, Pfetsch (2020) reminds us that the public can approach political parties and governments directly without the intermediation of newsrooms that used to connect with political authorities and movements. That activists, agencies, and the online commercial industry do not bind themselves to the professional and ethical standards of journalism, and thus are more susceptible to manipulating content for their own cause. Furthermore, through digital media, they have as great a reach as traditional information chains.

Especially with social media, the illusion of an unmediated public debate has been created, in which everyone is free to express themselves, while in reality no exchange of opinions occurs, but the opposite, the strengthening of individuals' opinions from the bubble filter that their relationships form (PARISER, 2011; PICCININ, CASTRO, CASTILLO, 2019). New technologies certainly offer opportunity to increase the reach and diversity of opinions by connecting people who are distant and from diverse perspectives, thus blurring the distinction between groups, but in practice the dissonance of voices and competitiveness for maximum content propagation prevent this from happening (HAWDON et al., 2020). What is more, they turn the apparently beneficial democratization of information into an extremely effective means of weakening the boundaries between facts and opinions.

In this direction, one can also cite the notion of a post-truth, which denotes the moment when appeals to emotion and personal belief are more influential in shaping public opinion than objective facts, signaling the loss of legitimacy of science in the face of the greatly amplified digital requirement for bombastic rhetoric and impactful stories, belittling experts. By instance, Kakutani (2018) reminds us that the average of contemporaneity has turned out to be paranoia and exaggerations - a society of fear and moral panics - which are catalyzed by general uncertainties, regarding economic, health, and environmental conditions as a whole. With its culture of connectivity, the Internet seems to bring these concerns to the boiling point, spilling over into the core of the cultural disputes that mark the current political confrontation.

In this sense, for example, Baldi (2018) focuses on populist reactions to ideas of a cosmopolitan culture - collaborative, based on the intelligence of crowds and with transparent mediation - that take the form of political propaganda (fake news) to take advantage of the disintermediation and apparent horizontality of the internet. She thus identifies a constant search for aggregative reactions around slogans and insults, exposing those involved with these common goals as carrying social bonds of pure conviction in counterposing targets that do not align with the same vision, in this case experts, traditional media, and authorities.[2] Despite the author's specific target, it is expected that these conduct traits are not exclusive to this "conservative" portion of the political dispute, but should also be perceived in progressive opponents - proponents of this cosmopolitan culture - through our empirical study.

Going back a bit, one should note the importance of liberal democracies for the expansion of media outlets and their placement at the center of the political process, since television-mediated public image management of authorities was the main mode of contact with potential voters and distant audiences. As John Thompson puts it, since print media and even more so with electronic media, "struggles for recognition have increasingly become constituted as struggles for visibility within the non-localized space of mediated publicness. The struggle to make oneself heard or seen (and to prevent others from doing so) is not a peripheral aspect of the social and political upheavals of the

[2] On the whole, Baldi (2018) debits these phenomena to digital media, through the dismantling of hierarchies, immediate access to any information, ease in the production of content (comments, videos, photos), etc., which have revealed a social fabric permeated with rancor and prejudice.



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modern world; on the contrary, it is central to them" (THOMPSON, 1995, p.247). Many social movements succeed in their claims and support from the intelligent use of the media.

"Media images and messages can tap into deep divisions and feelings of injustice that are experienced by individuals in the course of their day-to-day lives" (THOMPSON, 1995, p.248). This politicizing and making visible the invisible serves as a catalyst for reactions even in the most distant locations from the original event. More than that, media institutions, through the distribution of information and different points of view, are essential in the cultivation of diversity and pluralism, which is an essential condition for the development of deliberative democracy (LOUW, 2005). Deliberation thrives on the clash of competing views, which is the extreme opposite of an orchestrated chorus of opinions that does not allow for dissent. Media, including social media and traditional vehicles, should serve as safe platforms on which power can be challenged and a diversity of opinions can be expressed, not as unofficially sanctioned echo chambers of authorities and pompous interests, taking advantage politically and economically of general incomprehension and mediation.

In the realm of news specifically, digital media allow for increased monitoring of audience reactions to news media, whether through click-through rates to news stories, reader comments, or social media activity. In addition, increased competition and economic squeezes make apprehending and understanding readers' news interests - visible audience preferences - even more important to newsroom selection processes. The criteria are shifting from professional journalistic principles to what is best economically, which is matching the internet audience's relevance structures - abandonment of a clear sense of public purpose in favor of product optimization (WENDELIN, ENGELMANN, NEUBARTH, 2017).

This alliance between journalistic flexibilization (pressures for publishing and reach) and free circulation of user-generated content serves as a springboard for the infamous issue of fake news (HIMMA-KADAKAS, 2017). One must define the term, which, in the context of this paper, is about intentionally manipulated news with political ends supporting their action to misinform, or more neutrally, cause disruption to information.[3] The distinction with rumors and genuine journalistic errors remains difficult to determine, however, since political effects (and even more so individual reactions) are independent of authorial intentionality.

From this communicative environment created by digital media, the most feared result is polarization, or even hyperpolarization.[4] Overall, it can lead to political gridlock, tribalism, and the erosion of social capital - the escalation of culture wars, social destabilization, civil unrest, and political violence itself. Hawdon et al. (2020) differentiate both from their effect on social capital: hyperpolarization takes hold when inter-group social capital decreases, and intra-group social capital increases, which tends to radicalize members' views. In this sense, the blame for social media falls on algorithms and the increasing political bias of traditional media, which tend to distort news to fit its implications into the preferred narrative (PRIOR, 2013).

As Blankehorn (2018) summarizes, recent changes in social media have a pervasive effect on increasing political polarization, notably, the spread of media ghettos, bubbles in which we do not challenge our opinions, but harden them and make them more extreme. He traces two main causes: the abandonment of editing, fact-checking, professionalization, and the privileging of institutions over individuals, which guaranteed media quality, in favor of the total freedom of anyone to publish material to gather clicks, which is an atomized and leaderless non-system; finally, the decline of journalistic accountability and standards in favor of poor quality content in the pursuit of volume and repetition, as well as the blurring of boundaries between news and opinion, facts and non-facts, and reporting and entertainment.

In sum, in part because of the developments in digital media highlighted here, one expects to observe contemporary media transpiring: appeals to emotion and personal belief; trampling of due diligence due to the viral and competitive nature of the web; individuals and groups mired in invisible bubbles or properly echo chambers, demonstrating their alliance to a specific positioning in search of collective acceptance; news with bombastic rhetoric, or even directly manipulated and for political ends; disparagement of experts; paranoid and exaggerated narratives that use fear and moral panic as weapons of mass conflagration; aggregative reactions around slogans and insults against a common enemy that is vilified; suppression of certain perspectives in favor of others as an expression of the struggle to be heard or seen and to prevent others from doing so.

*b) Culture Wars*

The concept of culture wars, despite its contemporary resurgence, originally designated the

[3] It needs to be pointed out that this definition is not a general consensus. One can cite the perspective of the National Endowment for Democracy (NED), for which fake news is defined by the search for financial return from advertising revenues of major platforms (JACKSON, 2018). Also, that of Michael Radutzky, who conflates them by their popular appeal regardless of whether they appear false for lack of verifiable facts (LAZER et al., 2018).

[4] This differentiation is important if one accepts the argument that the former is potentially beneficial for democracy because it simplifies electoral choices and incites greater political engagement by citizens (McCOY, RAHMAN, SOMER, 2018).

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conflict between the German states and the Roman Catholic Church in the second half of the 19th century, in the so-called *kulturkampf*. The dispute was animated by the liberal aim of secularization, while the church wanted to maintain its influence on the issues of family, marriage, and especially education. In addition to the effort to separate religion from the state definitively, the division between Protestants and Catholics deepened with unification, as did the distrust of the Vatican.[5] The result was pamphlet campaigns in the newspapers, articles slinging mud at the opposing side, and conflagration with the political disputes of the time, namely Bismarck's intention to deflate the (Catholic) Center Party and the liberal desire to uproot all Catholic ideology from society (complete the Reformation). Thus, unlike its current counterpart, the state took direct part in the conflict, and, through numerous laws and regulations, effectively ended up being the central actor in the conflict process rather than the groups (STEINHOFF, 2008; GROSS, 2004).[6]

The importance of this historical review is precisely in allowing us to draw parallels with the contemporary vision of the concept and the disputes at the practical level, even if global considerations about the phenomenon are beyond the scope of this article. To make the counterpoint, then, we move on to the resurrection of the term with Hunter (1991), who defines culture wars as a conflict to define American public life between a progressive and an orthodox - or conservative - ideology.[7] They protagonize a polarized realignment from distinct moral understanding systems, the former with an evolutionary and contextual moral truth and the latter with a static and universal moral truth. This anchor informs their positioning on controversial issues of values, beliefs, and lifestyle, prominently including feminism, drugs, gun liberation, homosexuality, race relations, religion, curriculum structures, climate change, etc. The main fronts of this confrontation end up taking place in the various institutional entities touched by a cultural praxis, such as communication and teaching, although the cleavages are apparent in sections that should transpire pragmatism, such as governments and businesses.

From this we come across some points for discussion, starting with the basis of the conflict, which is the formation of two alliances identified with diametrically opposed worldviews. Pointing to specific causes for this alignment is fruitless for this debate,[8] only being important to point out that the polarization that the concept implies is necessarily an intergroup collective process, with people radicalizing themselves as part of a group and through their socially constructed "reality", their particular filter for understanding objective reality, which is too complex to grasp in a lone view. When groups become polarized, a strict distinction between "us" and "them" evolves; both groups claim that what "we" represent is threatened by "them"; tribute is paid to the symbols and values of the group - identities are reinforced - and the outsider is derogated (VAN STEKELENBURG, KLANDERMANS, 2010; GITHENS-MAZER, 2012).

This connects directly with Durkheim's (1997) common/collective consciousness, which animates (but does not determine!) individuals to support the position, especially in moral terms, that most directly reinforces the bond they have with those in their reference group.[9] We seek to cement the connection with our cultural groups and reinforce our definition of ourselves, maintain consistent beliefs by giving greater weight to the evidence and arguments that support them rather than spending energy disproportionately trying to refute opinions or arguments contrary to our expectations. It is more comfortable to learn what our reference group believes and integrate those beliefs into our viewpoint than to investigate complex issues (HOFFMAN, 2012). Thus, it can be seen that the connection to a larger consciousness is not only moral, with group identities also directly influencing how people perceive the social world by providing norms and values that distinguish the group from other social categories and provide clues about how to think and act in particular communities or social situations (TAJFEL, TURNER, 1986). In particular, culture wars happen after the increase in group cohesion that produces dangerous biases, such as polarization, radicalization with groupthink (conformity of opinions without critical evaluation), externalization of

[5] Specifically, the number of Catholics rose due to the unification with the southern states such as Bavaria, which had a Catholic majority. It was also common for villages to be religiously homogeneous, with people of different beliefs not mixing. As for the Vatican, the doctrine of papal infallibility proclaimed in 1870 and the quest for more control of the bishops was not looked upon favorably (ARLINGHAUS, 1942).

[6] From an expository and completeness end, from 1871 to 1876, a number of laws were passed assuring the supremacy of the State over the Catholic Church, including modifications in the structure of its operations in Germany. From 1878 the liberal impetus lost strength and allowed more pragmatic positions to dominate the reconciliation between the Holy See and the German parliament (GROSS, 2004).

[7] The original focus of this distinction is to reflect the Christian religious and sometimes evangelical inspiration of the positions held on the orthodox side, and the growing atheism of progressivism (HARTMAN, 2015).

[8] The main reason for this is because determining this causality does not impact the occurrence of the phenomenon within the parameters of the article - it continues to exist even if we do not know why. The omission of this is also justified because the literature points to multiple causes. Citing just one, Jensen, Seate, and James (2020) explore how the perception of crisis (such as that growing in several areas) by collectivities is a critical incentive for greater solidarity and political radicalization, assisted by psychological and emotional motivators such as individual powerlessness (wanting to feel empowered) and tribalistic groupthink.

[9] As Jacoby (2014) addresses, there is always the element of the individual abstracting the values and conceptions of his cultural milieu and coming to his own conclusion - of course, marked by culture - of desirable end states to human life. Problems arise when mutually exclusive differences in these end states develop between groups in society, which can, but do not necessarily, generate cultural conflict.



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social prejudices, avoidance of responsibility for choices, etc. (DELLA PORTA, 1995; McCAULEY, 1989).

This polarization results in a total ignorance of the other, with groups that oppose each other too exaltedly tending to coincide, as they reduce their distinctions to generic abstractions of their constitutive historical processes (BALDI, 2018). The sides of this conflict demand that people actively show their position and mobilize against their opponents, with the movements dictating beforehand how these should be perceived.[10] That is, the interpretation of the meanings and possibilities of reading the content in dispute is vetoed, which are already given and do not change among situations if not by varied formats of representation (SOUZA, AZEVEDO, 2018). In other words, there is no dialogue, there is binary thinking, absolutization of preferences, selectivity of points, and, at a more baseline level, a generalized failure to disagree peacefully, to show empathy, to take into account the perspective of others (BLANKEHORN, 2018; NEISSER, 2006).[11]

Moving to the basis of the difference (and thus conflict) between these groups, it has been said to stem from incompatible moral understandings, especially stemming from religious views on the one hand and secular views on the other (HUNTER, 1991). Overall, since the 1990s, this division of diametrically opposed worldviews and principles has grown, escaping the perspective that political litigation in the USA reserves itself to widely acceptable discursive boundaries.[12] Recently, Jacoby (2014) finds that this divide in values has deepened to become a general ideological dispute, regardless of aspects such as religion, income, race, or gender. This conflict remains widely distributed along partisan and religious lines, however, as Castle's study finds (2018).

Distinctly, too, there is now a recognition that culture is a larger battleground in which diverse symbologies (identities, religions, commodities, rights) present themselves and vie for primacy in the processes of resignifying how one knows and perceives social reality, which was extremely incipient in the liberals of the *kulturkampf*. In other words, the culture wars are not just about contention on isolated issues, but conflicts that address the cultural root that symbols and meanings constitute.[13] What is sought is to increase the symbolic capital of the group and to impose their worldviews, emplacing them in Bourdieu's socially and institutionally authorized language, which is recognized by the collectivity, and therefore lends legitimacy and power to represent and speak officially (BALDI, 2018).

One must frame the culture wars in the culturalist view that human beings swim in a sea of meanings that is the result of a process of semiosis. We are born into pre-constituted seas and internalize them as we are socialized and learn to communicate.[14] Communication itself emerged with groupings or structures of meanings and coding that congregated over time, taking on identifiable forms in societies or cultures (LOUW, 2001). As Schutz's (1973) view of phenomenology addresses, meanings arise from communication between people, which is possible because of the "idealizations" of the interchangeability of viewpoints and the congruence of hierarchies of importance. This reciprocity, this detachment of meaning from specific social situations is what leads to the apprehension of objects and their aspects by me and others as the knowledge of all, thus being conceived as anonymous and objective and facilitating social interactions. With a view to the culture wars, it must be emphasized that this objectivity is necessarily provisional, since the activity of constructing meanings is continuous, and it can be argued, as sociological ethnomethodology does, that there is no such thing as a culture - a commonly accepted set of conventions -

[10] This tribalistic chasm that is triggered by a prolonged social divide is in great danger of degenerating into a "logical schism," as Hoffman (2012) calls it, which is a breakdown in debate in which the opposing sides are incomprehensible to the other because they start from completely different cultural foundations (of one's own way of thinking).

[11] In this issue of public dialogue, Neisser (2006) denounces mainly the proliferation of a false dialogue by the media, which tends to exclude important perspectives from the conversation, or else pressure and shame participants into agreeing with preconceived conclusions. The quest for attention through social media also undermines the primary function of the public sphere, which is to give visibility to the contradictions and disputes that arise from the coexistence of issues from many publics, which should outweigh the normative goal of consensus - therefore, to disagree peacefully (PFETSCH, 2020). Overall, the manipulation comes from representatives across the political spectrum, often not being conscious attempts to deceive, which only indicates the anemic state of the dynamics of conversation and reception of disagreement, which come to require adherence to what are considered "legitimate" opinions of a given issue.

[12] This discussion goes back as far as Tocqueville, through Devine and Dahl, who describe American political culture as liberalism tempered by democracy, with a general consensus on fundamental orientations. Baker (2005) and Fiorina, Abrams, and Pope (2006), however, argue that the reality is much more complex and inconsistent, with combinations of traditions and values, and conflicting visions of how to order social life characterizing the country, but not necessarily meaning a culture war.

[13] As the frankfurtians have already put it, efforts to counteract the dehumanization promoted by the repressive society must address the mind of individuals, which is "the place of entrance, there where the false consciousness takes form (or rather: is systematically formed) - it must begin with stopping the *words* and *images* which feed this consciousness. To be sure, this is censorship, even precensorship, but openly directed against the more or less hidden censorship that permeate the free media." (MARCUSE, 1965, p.111, emphasis added).

[14] As Geertz (1973) describes, everyone encounters meaningful symbols when they are born, which remain latent and take root, even with some additions, subtractions, and partial alterations. They are employed spontaneously for the purpose of erecting a construction on the events experienced and providing guidance for the things experienced.



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since symbols are continuously (re)constructed in individual social encounters.[15] All individuals participate in the process of changing meanings, since all communication depends on the context (space-time and relational), although those with greater power - access to media and circulation systems - have a greater role to play.[16]

As Welch (2013) addresses this question, adapting to the discursive environment is like adapting to the economic one, meaning that we integrate ourselves into salient inequalities in a space in which we possess little ability to influence. Following the analogy, discursive meanings (symbols) end up being the currency of human communication, distributing the values that allow the exchange and circulation of speech and writing. Thus, it should be noted that the influence of discourse on behavior is not direct, with symbols altering conscious attitudes, underlying values or internalized rules, but indirect through the construction, transmission and transformation of meanings.[17, 18]

This leaves us at the doorstep of the points of greatest cultural contention, which are divided into those where discourses are produced (newsrooms, studios, parliaments, courts, universities) and where they are distributed (schools, media, churches). There is a constant struggle to control access to and the functioning of such places. Through them pass sets of meaning that are always in flux, as the very result of this constant conflict rooted in contextual relations - efforts both for and against the hegemony of different meanings. It is from the encodings, hybridizations, and syntheses generated here that cultures are constructed and reimagined, with globalization making possible overflows from other cultures even more frequent (TOMASELLI, 1987). This influence of foreign cultures is historically significant, and, in the case of the culture wars, seems to take on a worldwide scale, especially in countries of closer cultural matrix.[19]

Distinguishing these sites of conflict, two views leap into prominence for their interpretation, lending different importance to their control. From a structuralist, Marxist, or Foucauldian perspective, meanings are effectively controlled from the ideology and sanctioned discourses of each circumstance, and it is thus essential to control the structures of production and distribution.[20] On the other hand, there is the view that meaning is not controllable because the recipients always actively read, interpret, and decode meanings for themselves, and are not simply naive recipients of manipulation. In the absence of further practical examination, the important point to note is that regardless of which side of this spectrum reality tends - total control of structures or total independence of the individual - cultural warriors do not risk being guided by the second position; quite the contrary, they believe that over time they will be altering accepted meanings, and that this requires efforts at the structural level.

Of great interest here as well, conflicts over discourse mean that different interest groups are simultaneously engaged, with their discursive positions taking on liberal or restrictive features depending on the context (LOUW, 2001). For example, feminist discourse can be used both to challenge restrictive (patriarchal) social relations and to curtail debate about power relations (offhand, no woman can abuse power). On the other side, the conservative discourse can serve both to preserve institutions that have proven to be adequate (democratic, republican) and to obstruct inclusive reforms because they are not in line with prevailing interests. Note that in these examples the restrictive format is not inherent to the values of these ideals, but radicalizations, denials to dialogue that end up happening in practical political contention.

In conclusion, then, this phenomenon is not new to the political field, though it differs from the *kulturkampf* in the greater appreciation and awareness of those engaged in seeking to shape cultural terms, with this competition for symbolic dominance becoming more evident to society as a whole, as well as taking center stage in the discursive clashes themselves (THOMSON, 2010). As with its current counterpart, the discussion of values, beliefs, and habits takes a back seat to the confrontation apparent in the media and other social institutions. Despite this similarity, *kulturkampf* points to the state's mediation of the actors

[15] In other words, one can take the symbolic interactionist view of Blumer (1969), which illuminates this exposition from three central propositions: that people act on the basis of the meanings they have toward things and other people; that these meanings are derived from social interaction with others; and that these meanings are managed and transformed through an interpretive process that people use to make sense of and deal with the objects that constitute their social world.

[16] This is a rather mild way of partially embracing the Marxist view broached by Volosinov (1973) of a semiotic dispute, in which the dispute over meanings and material resources influence each other.

[17] This is why systematic cultural change is easier to detect in symbolic forms and their modes of production and circulation in the social world than in broad changes in values and beliefs, attitudes and orientations, which apprehended through surveys show a slower curve of change.

[18] Pulling Volosinov (1973) again, he is the one who concretizes the view that the causal relationship between base and superstructure in Marxism is not a mechanical causality of a positive natural science, but an indirect causality that occurs through language, and more narrowly, meanings.

[19] Of course, this is just a conjecture beyond the scope of this paper, but in what has been discussed here seems to be easily seen in the distinction of cultural positions between the religious (Catholics and Evangelicals) and non-religious (atheists and agnostics) in the Western world and its larger sphere of influence (Latin America).

[20] Again with an example from Marcuse (1965, p.100-1, emphasis added), he is categorical that, after the revolution against the conservatives, "the restoration of freedom of thought may necessitate new and rigid restrictions on teachings and practices in the *educational institutions* which, by their very methods and concepts, serve to enclose the mind within the established universe of discourse and behavior".



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and their causes as the most likely way to ameliorate the conflict, which the nature of contemporary culture wars does not allow, since agency is much more diffuse, issues are more global and unified, and social division is extremely more pervasive and deep. In the end, the direction of public opinion is the key point of the concept, that is, the framing of citizens' way of thinking by the meanings and understandings enunciated by identity movements through the media, which direct debates and public opinion towards one of the antagonistic view poles.

Thus, in conjunction with the items highlighted in the first section, it is expected to observe contemporary media transpiring: analyses biased by its own cultural environment (moral and partisan); presentation of a reality that can only be apprehended through the group filter; marked distinction between "us" and "them", with misrepresentations of the other side; groupthink; evasion of responsibility for choices; false dialogue and selectivity of points; resignification of social reality with the transformation of symbols, whether that be language, historical characters, works of art, entertainment or scientific, etc.

## III. Culture Wars as Captured on the Wi Spa Case (2021)

What I refer to as the Wi Spa case was a controversy over the exposure of male genitalia by a trans woman in the women's section of the spa, involving as well the ensuing protests that happened on July 3 and July 17 of 2021, which hosted parties for and against the right of trans people to be in their self-identified gender areas on nudity allowed spaces, like the Wi Spa.[21] As a whole, the case proves important as it provides a clear picture of the media and underlying discourse dynamics of a typical culture war battle. Before going through each media coverage of the incident itself, this initial section will lay out purely the events that happened, taking as factual evidence the videos and declarations from the parties involved,[22] with the aim to simply relay the story without any imbued interpretations. The usefulness of this reconstruction lies in providing a neutral basis for comparison with what each broadcaster will centralize in its own narrative.

The episode gained traction from a viral Instagram video, which showed a woman filming herself confronting Wi Spa staff about seeing a "man" naked in front of women and underaged girls in the women's section of the facility: "There are girls down there, other women who are highly offended for what they just saw, and you did nothing, absolutely nothing." The staff at Wi Spa defends itself against the woman's accusation citing they had to comply with the law and not discriminate based on gender identity, or precisely, "sexual orientation".[23] Another patron suggested the individual might be a "transgender person", with the woman filming, which identifies herself as "Cubana Angel", responding that "there is no such thing as transgender [...] I'm a woman who knows how to stand up and speak up for my right [...] As a woman I have a right to feel comfortable without a man exposing himself". At least three other women are seen siding with her view of the events (cf. HILL, 2021).

No more substantiated evidence was found that could verify the woman's account, with the Los Angeles Blade newspaper reporting that anonymous sources from Wi Spa staff and from the Los Angeles Police Department (LAPD) were doubtful any transgender clients were present in the spa on the day of the incident, which would make the whole story a hoax (LANSING, 2021). Factual or not, the LAPD effectively pressed five charges of indecent exposure against a 52-year-old person called Darren Merager, whose gender identity remains uncertain, but is a repeated sex offender since 2002 (QUEALLY, CHABRIA, 2021).

Either way, Cubana's video made the rounds online, especially on right-wing media outlets, sparking demonstrations to take place nearby Wi Spa. The first occurred on the morning of July 3, with multiple videos showcasing the involvement of three large groups, one in defense of trans rights, one against, and then the LAPD. Specifically, the defense was composed of LGBTQ+ activists and black bloc SoCal antifa members, while opposing them were QAnon, Proud Boys, Trans-exclusionary feminists (TERFs) and Christian conservatives such as Cure America Action, which gave Cubana Angel a political platform.[24] A myriad of violent occurrences ensued: an against man with a bullhorn speaking that the crowd would go to hell was beaten up by 6 black bloc people; another against man was hit with a skateboard on the head; an antifa guy was hit with a chain bead by a shirtless man; persons in black clads, masks and headgear set a dumpster on fire while police was trying to disperse the crowds off the street after they declared the whole

[21] Specifically, Wi Spa has a separate floor for men and women, where their policies mandate that swimwear not be worn by the patron (cf. WI SPA, 2021).

[22] Unifying the evidence, the original video was stored by Hill (2021); extra information was fetched by Lansing (2021); footage from the protests were reviewed from multiple sources, including: CBS (2021), FOX 11 (2021a), Singh (2021a; 2021b; 2021c), Guardian News (2021) and Mackay (2021); Los Angeles police report on the second encounter is available through LAPD (2021).

[23] The referred law from California can be found on California State Legislature (2015), which states that regardless of multiple differences, all persons "are entitled to the full and equal accommodations, advantages, facilities, privileges, or services in all business establishments of every kind whatsoever."

[24] They restated her account and political drive on July 7 (cf. CURE, 2021).



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gathering an unlawful assembly; chantings of "save our children" are heard while police pushes pro-trans people rights back; an against man with a lead pipe hits the back of the head of a press labeled person; two against men feature a gun and out "something to shoot you with"; one against man gets angry over filming by trans press reporter and is backed out by police; one police officer intimidates a pro-trans cammer aiming his shotgun point blank; at last, two stabbings occur by a right-wing protester, one against a pro-trans and another against his own fellow activist (cf. CBS, 2021; FOX 11, 2021a; SINGH, 2021a; 2021b).

The second protest took place on July 17. This time the LAPD was better prepared and in greater numbers to enforce the status quo. Multiple video evidence show more episodes of violent behavior, mostly by the police itself: a standing still woman yelling "don't shoot" was shot point blank by a police officer with less-lethal bean bag rounds; "save our children" chanting occurs again; police assaults pro-trans activists with batons, breaking a press person's hand; another left-wing protester is shot after flinging a paper string; police forces the pro-trans activists into a kettle; more shots happen aimed at their general location, and smoke bombs are deployed; a right-wing woman yells with opposing protesters until she is taken back by police; journalist is harassed by group of people wearing anti-communist t-shirts (cf. GUARDIAN NEWS, 2021; MACKEY, 2021; SINGH, 2021c). Opposite to the first, in this instance the LAPD made arrests, 38 to be exact. The police attitude was deemed too violent and one-sided against the pro-trans activists, leading to attorneys launching a lawsuit against the LAPD - full announcement can be found on FOX 11 (2021b). The LAPD (2021) defended itself citing the violent turnout of the first encounter, the antifa graffiti that appeared on public buildings, the carrying of knives and sprays by the pro-trans group and throwing of frozen water bottles, with both sides supporting a clashing intent.

*a) Fox News' Coverage*

Fox News' first publication regarding the incident came out on June 28, 2021, with the title being: "LGBTQ community 'appalled' after transgender person exposes male genitalia in front of young girls at LA spa". The original story is restated while emphasising the presence of young girls and the lack of response from Wi Spa staff due to the individual's "sexual orientation" and the state's legal requirements. The main line is following the reaction of Tammy Bruce, a member of the LGBT community that was appalled, recalling the difficulty of changing gender and the political use of their issues: "the transgender community has got to tell that the gay political leadership to stop using us as this weapon to try to keep people divided". The pedophilia worry is brought up again: "That is a jerk who goes and does that. That is not someone who was looking at their identity and handling situations appropriately". The aired section of the news is even clearer, with Tucker Carlson highlighting that a "biological male walked into the female kid's section of the spa with his genitals exposed". Cubana's viral video is reproduced, while she's elevated as being a courageous woman for fighting off the obvious (HALON, 2021).

Overall, the publication tries to avoid directly confronting the trans rights issue, using the term "biological male" to frame the story as an example of how gender identity can mask pedophilia intents, which is of simpler bashing. The LGBT name is appropriated and hastily attributed the 'appalled' reaction to emphasize this discourse, with an emotional justification through the acknowledgment of how difficult it is to change one's gender. No *fact-checking* is made to conclude if the story really happened, making clear the usage of it as an attempt to politically unite against pedophiles, even though it was unsubstantiated.

The second publication covers the first protest on July 3, stating it was sparked by an allegedly exposing of transgender woman, with "both sides of the transgender rights movement clash[ing] at the scene." Violent occurrences are described without assigning blame. The original story is restated as seen in the viral video, and the first article by Halon is referenced. A 10 minute-long video without commentary shows the protest while still a peaceful gathering (RUIZ, 2021). In general then, no narrative is discernible, even though the LGBT endorsement of the other piece is brought up at the end.

As January (2021) recollects, between the latter and the former publications there were other two mentions of the story on Fox News Primetime. The first has guest Mollie Hemingway admit that the episode could have been "some sort of stunt", but while also emphasising its "horrific consequences for the entire civilization". The second has guest Abigail Shrier, who attributes a beard to the alleged perpetrator, using the occurrence as an example to oppose a bill that would grant "any male who identifies as female an all-access pass to women's rights and protective spaces." Both pieces show clear uses of hyperbole and emotional manipulation aiming for an aggregate response of repudiation against the case.

On July 17 came the third article, covering the corresponding protest. It announces directly on the headline that it was Antifa violently clashing with the police, citing video snippets on multiple Twitter posts. The publication then highlights a flyer posted online by the Youth Liberation Front, which encouraged a gathering to "SMASH TRANSPHOBIA" and fascism, as a "ROUND TWO MOTHER F*". The nude allegation and Spa's defence are restated at the end (BEST, 2021). Considering the main focus of the July 17 confrontation was between police and pro-trans activists, this piece takes the latter party as the aggressors, even though the footage goes both ways.



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At last, after the pushing of charges by the LAPD, Carlson (2021) hosts a small segment dealing with the case again, where he recalls the original episode and restates the story as a biological male disrobing on the women's section. He brings Andy Ngô as a guest, remarking him as telling "the truth under all circumstances". Ngo speaks of the charges against Merager as vindicating the validity of the case against claims by "establishment press" that it was a transphobic hoax. He reached out to Merager, who asserted she was a victim of transphobic harassment. This apparent closure leads to direct analogies framing the left as hypocrites, since they didn't outright believe, but campaigned against Cubana, who's a "black lady", going against what the "believe all women" mantra dictates.

In sum, through their coverage, Fox News' appeared conforming to right-wing talking points on digital media, particularly with the shifting of the discussion towards pedophilia and its detestable consequences for society, and the finger pointing towards antifa violence while police and against trans protesters were not accounted for on the overall clashing picture. The positioning on the ressignificance front was to defend a condemnatory view of the nude body and the street brawling.

So, in conclusion, Fox News' coverage encompasses highlighted aspects in relation to both (1) digital media and (2) culture wars: (1) due diligence and fact-checking of the original episode aren't done, with the possibility of it being a hoax de-emphasized; appeals to emotion and perhaps paranoia, with the former occurring first in a manner to bond with the LGBT community and the latter in a fear mongering about the future of civilization such occurrences be normalized; the channel avoids the direct manipulation of news and vilification of trans people, though; (2) the analysis is markedly situated in the prevailing conflictual cultural environment prevalent of the internet and US national politics, advancing a mostly right-wing perspective of the events, whose understanding requires the grasp of the conservative moral that underlies it; the distinction between "us" family defensors and "them" child groomers is very clear; there is some level of uncritical conformity and point selectivity (avoidance); the defense of the taboo significance of the naked body is anchored in the conservative moral matrix, without a deeper explanation, which also applies to why street violence is condemned, and in the case of the second protest, entirely laid upon antifa participants.

*b) The Washington Post's Coverage*

The Washington Post made only one publication regarding the incident, which came out on July 5, 2021 with the following title: "A trans woman undressed in a spa. Customers said they were 'traumatized,' and a protest ensued". The article focuses on the "apparent disrobing" and ensuing viral video as the latest battle over transgender rights, defending gender-inclusive public facilities citing a study on the matter. The presence of a transgender woman only "reportedly" happened, but even if it did, the significance of the exposed genitalia is downplayed as not been automatically inappropriate. The opinion of one member of the LGBTQ community is brought up to argue this point, which is that women-only spaces should be protected, but people must recognize not all women have the same genitals. After finishing recalling the original video, the piece moves on to cover the July 3 protest, centering only on the "children's rights" protesters violence, such as the gun flashing and pipe backsmack, highlighting homophobic slogans and QAnon involvement. Fox News' stint with the story is cited. Finally, in juxtaposition to the quote of them possibly being "an impostor" "faking to be a woman", transgender women receveing death threats online is covered, emphasising their fear of assault, especially when they're unable to use the public space of their choice, according to a study (ANDERS, 2021).

Even though The Washington Post only published this lonely piece, it makes patently clear the outlet's left leaning position. It doesn't eschews due diligence, but it chooses to focus on the pro-trans perspective, whose understanding requires grasp of progressivism's moral underpinnings. The article also elucidates the crux of the ressignificance debate of this case, which focuses on the nude body and how it actually is normal for women to not all have the same genitals, instead of it being a pathology in Durkheim's sense. Street violence is not directly ressignified, but the one-sided nature of the coverage skews readers opinion formation. The juxtaposition of trans women being "impostors" has a similar but this time also emotional effect, with the reference to studies working to strengthen the Post's discourse. All this means that the Post is tangled up in culture wars and digital media struggles as much as Fox News, although they seem less explicitly aiming at this result.

*c) The Guardian's Coverage*

The Guardian's first publication regarding the incident came out on July 18, 2021, stating that Wi Spa became the target of a rightwing media storm because of its trans-inclusive policy. The article starts directly confronting the issue of whether trans women in women spaces endanger cis women or cause pedophilia, which was an implicit claim of anti-transgender activists. It then proceeds to single out the participation of QAnon and MassResistance, two anti-LGBT organizations. Police action to disperse the gathering was treated fairly, although one participant's quotation casts criticism: "the people who talk about law and order are against the laws that protect trans people". The bigger focus of the piece then is to frame this episode as the newest right-



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wing anti-LGBTQ campaign, highlighting Fox News' run of the story, while bringing up the lack of evidence of the original incident, as brought up by Lansing (2020). The final section restates Wi Spa's response, and then emphasizes Southern California as "a center of rightwing extremism" and the LAPD response as agressive (BECKETT, LEVIN, 2021a). Compared to previous coverages, this first publication is very balanced on the relaying of the original incident, although it explicitly aims to detract anti-trans protesters, with no mention of opposite instances of violence even though it mentions the presence of "anti-fascists".

The second article chronologically is the main story put forth by The Guardian, coming out with the title "'A nightmare scenario': how an anti-trans Instagram post led to violence in the streets". It begins by stating that the original allegations are unsubstantiated and were caullosly reverberated by rightwing media, resulting in "chaotic rallies" in an example of how "viral misinformation" can lead to violence. The focus lies on showing the impact of the episode on trans individuals, which still appear as prime targets of harassment. After retelling the incident's origins with the spa's response and highlighting its lingering uncertainty, the article inquires about Cubana's political motivation and Christian affiliations, the mutating of the unverified story through right-wing accounts and Fox News segments, and the pedophilia scare that seems like a contemporary "moral panic". The anti-trans activistas are equated to an online mob constantly running the "save our children" and "women are being traumatized" tactic. Especially reported was Precious Child, a trans woman, suffering from accusations and harassment over being mistaken as the alleged perpetrator of the incident. The first street brawl was of difficult accountability due to the lack of arrests, with the piece retelling some pro-trans demonstrators perspectives, while also recalling right-wing putting the blame on anti-fascist activists. The final remarks sum up the message: "When you're just trying to belong in society, and then you hear someone else is complaining that you are in a public space, just because of who you are, it's really traumatizing." (LEVIN, BECKETT, 2021).

The last publication continues pretty much in the same vein, bringing up some comments: Gaye Chapman, a gender-criticital feminist that was protesting on July 3, said "I just feel sad about the whole thing [...]. This is not a good way to present arguments we have." Precious Child said she feared the news may "support a narrative that trans people are sex offender demons that take advantage of systems that are put in place to protect people". Jamie Penn, a trans woman who had joined the counter-protests, also said she was worried "what the far-right disinformation machine is going to turn this one into". The article's existence is due to the felony charges pushed by the LAPD, with the remaining uncertainty over the target's gender identity being highlighted. While recalling Cubana's claims and political drive, the piece cites one study that shows no evidence of increased safety risks related to trans-inclusive policies. A law professor is quoted on the police charges, stating that there needs to be malicious intentionality to the nude and that at the end of the day it's an "individual's conduct, not about a class of people" (BECKETT, LEVIN, 2021b).

In conclusion, The Guardian's coverage also goes through highlighted aspects in relation to both (1) digital media and (2) culture wars: (1) overall, it painted a pretty balanced picture of the whole episode, dealing directly with both perspectives, not appealing to personal emotions, manipulating, instilling panic or vilifying; (2) the coverage is informed by the larger cultural conflict though, since the case fundamentally demonstrates a struggle for change that requires cultural adaptations, not exclusively political ones; the analysis is clearly left-leaning and pushes for the normalization of this worldview with regards to the naked trans body, although less explicitly than The Washington Post, but nonetheless impetuously, seeing how they confront the right's diversion of the story to the grounds of pedophilia; the distinction between "us" and "them" is not overly pronounced, even though the anti-trans' violence is highlighted.

*d) Reactions and general Positionings on Twitter*

The story began circulating through social media, specifically Instagram, when the account "cubanaangel" posted the video confronting the spa worker about the incident. Taking into account that the episode happened in 2021, the recollection of tweets was made through the platform's own search mechanism, which was done using the following filters: "(wi spa OR trans) min_faves:100 lang:en until:2021-07-2 since:2021-06-26"; "(wi OR spa OR protest OR trans) min_faves:100 lang:en until:2021-07-6 since:2021-07-1"; "(wi OR spa OR protest OR trans) min_faves:100 lang:en until:2021-07-20 since:2021-07-17". A few tweets that were quite representative of the sentiment on Twitter on both sides of the dispute were highlighted below, covering the three largest phases of the whole case (the numbers in parentheses are engagement - sum of responses, retweets and likes; all tweets were retrieved on July 8, 2022):

*Original Incident*

*Mallory Moore (1.775):* "Days after it has been right across Fox News' news cycle and the whole internet, noone has found the alleged trans woman, despite many of us not being hard to find. I don't buy the Wi Spa story. I think it's cis mischief."

*ripx4nutmeg (1.720):* "Video: A group of women complain to staff at Wi Spa in Los Angeles that a 'man' entered their changing room and flashed at them & children. Staff ignore the complaint as a male customer



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accuses them of bigotry, because the flasher claims to be transgender"

*Paul Joseph Watson (967):* "Staff at Wi Spa in Los Angeles dismissed a woman's complaint that a man was exposing his penis to little girls in the women's area by insisting that the individual had a right to be there due to his 'sexual orientation.'"

*tonyagjprince (412):* "Now you have to really search through articles that don't paint that Black woman at Wi Spa as 'hateful' because she didn't want to see a male member during her self-care time. AND did what BW always do, stood up for someone else, a young girl. Self-care. Minding her own biz."

*July 3*

*Andy Ngô (27.641):* "An Asian man wearing a 'Rooftop Korean' shirt near the Wi Spa protest where antifa have been beating people was assaulted on camera. He uses a bottle to defend himself from the assailant, who then runs away."

*Andy Ngô (9.513):* "A Hispanic couple had their signs torn away & were threatened by antifa outside the Wi Spa in Los Angeles. "We come in peace," the woman said while they surrounded her and her partner."

*Andy Ngô (7.563):* "Antifa assault street preachers who tried to attend the Wi Spa protest in Los Angeles. Several people have been assaulted today but police don't appear to be responding at all."

*Rita Panahi (6.553):* "To be clear Antifa (aka modern day fascists) are assaulting people (incl women) peacefully protesting a spa that allowed a man (identifying as a woman) to expose his penis to women and children in female only space. When a woman complained they told her not to come back."

*Abigail Shrier (5.563):* "Watch how this woman is treated, in broad daylight, in Los Angeles - for standing up for women's rights and exercising her right to peaceful protest."

*Vishal P. Singh (2.283):* "Here is more clear video of this far right anti-trans extremist who was wielding a huge knife. He was seen fighting alongside Proud Boys. Right wing media is misconstruing this demonstration as peaceful, but anti-trans demonstrators were prepared to seriously maim or kill."

*James Barry (1.733):* "Man gets cock out in women's section of LA spa in front of two kids. Woman objects; told to shut up: video goes viral. Women have peaceful protest. Women are assaulted, shoved, physically bullied, intimidated; teenage boy swarmed by kicking mob, saved by his mum. This is insane."

*July 17*

*Vishal P. Singh (13.926):* "People want to say this wasn't a demonstration about transgender rights? Here's @LAPDHQ, after defending transphobes, destroying a transgender flag. Anybody who reports on Wi Spa without mentioning the transphobia at play by the far right & LAPD are disingenuous."

*Talia Lavin (6.571):* "As the far-right anti-trans demonstration at a spa in Los Angeles shows today, transphobia, white supremacy and far-right extremism are all intimately linked"

*Jackson Lanzing (5.905):* "Just blocks from my house, Proud Boys siege a local spa over manufactured trans panic. Counter protestors gather to stand for trans lives across the street. LAPD opens fire on the unarmed counter-protestors/journalists - and fires on them as they try to flee. Indefensible."

*Read Wobblies and Zapatistas (5.773):* "The security forces, known locally as "LAPD" are chasing anti-fascist demonstrators through the streets of the city near the Wi Spa conflict point. Widespread international condemnation expect to ensue."

*Andy Ngô (4.137):* "[...] An angry group of antifa confront & harass videographer Villain Report at their violent protest in Los Angeles over the weekend."

*Sam Levin (3.847):* "Pay attention to the severe violence in LA today by a far-right crowd, anti-trans protesters, and LAPD. Pro-trans demonstrators have been targeted, along with journalists, including my amazing colleague @loisbeckett."

*CajunBlueAZ™ (3.043):* "When you watch a woman get shot by the police with a plastic bullet at 10' for participating at a protest, you realize you live in a shithole country."

*Jules Gill-Peterson (2.450):* "Okay we're at the stage where violent transphobes get to protest something they entirely made up and the police enforce their political vision through beatings and rubber bullets."

This gives a general sense of how people have positioned themselves on Twitter over the case's unfolding, with right-wing sympathetics being the majority early on and highlighting the naked body perversity and antifa's violence, while left-wing individuals dominated the space on the second protests, stressing the lack of proof of the allegations and the LAPD and far-right activists' violence. The moral basis of the discussion about nudity between the differing biological sexes is not perceived in this slice of the confrontation, but is made clear on January's (2021) article which hosts a Matt Walsh tweet that reads: "A man flashed his penis in front of little girls at a spa and was allowed to do it because he claimed to be a woman. If you watch this video and find yourself siding with the man, please realize that you are not only insane but evil". It exhibits a clear defense of this question being treated on the grounds of pedophilia alone, coming from the conservative matrix and contrasting most sharply with The Post's progressive view, which seeks the normalization of different bodies being under a single gender.



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Overall then, the narrative dispute was the most scathing on Twitter, with representatives from each side upholding their idoneity and the other complicity on hateful displays of intolerance. There doesn't appear to be a disintermediation effect between what's on show in this platform and the traditional media though, since the latter portrayal seems more reliant on internal decisions rather than being pressured by social media, which only seemed to host the internet users debate (HATJE, 2022?).

Thus, in relation to emphasized aspects of (1) digital media and (2) culture wars, we can summarize about the reactions on the Twitter platform: (1) subtle appeals to emotion and personal experiences, absence of fact-checking, aggregative positions over targeted "hateful" groups (e.g., antifa, Proud Boys), which are vilified; (2) continence to one's own cultural ideology, which informs their interpretation of reality - muted dialogue and slight groupthink; marked division between the gentle "us" in a superior moral position and the rash and rageful "them".

## IV. Conclusion

In this way, we can conclude that the role played by digital media in this episode of the culture wars was to intermediate social communication, serving as the technical vehicle that enables a constant battling under the aegis of a greater cultural conflict, which in this case involves reference especially to moral understandings. Here, the incident in question focused on the discursive question of whether a trans woman had exposed herself to other women and girls and what that said about trans people rights and pedophilia, with the focus of resignification having been the exposed nude body and, to a lesser extent, the street violence. From there, the traditional media - Fox News and The Washington Post - took different stances: Fox News followed a right-wing viewpoint, holding a taboo significance of the naked body and diverting the crux of the question to possible pedophilia implications; The Washington Post also showed signs of bias, this time to the left, being the most explicit about defending a ressignificance of the naked body - women don't all have the same genitalia; at last, The Guardian was the most balanced facing directly the challenges of trans people which weren't considered by Fox, and lightly by The Post.

Altogether, this episode demonstrates the immense hardship of the pursuit to reach an agreement, a middle ground or consensus between people who identify as conservative and progressive. It restates the regrettable view that these sides maintain of each other, with both seeing the other perspective as extreme and possibly "world ending". It must be stressed that in this case the conservatives showed far greater levels of paranoia, though, avoiding the humanistic tint of the trans question to put in its place the pedophilia concern. Looking at social media such as Twitter, there wasn't much in the way of public debate, but an echo chamber where each side followed its own opposite interpretation of the events. The greatest risk is of a complete breakdown of dialogue and enclausuration due to incomprehensible moral underpinnings, seeing as though no real exchange on the core issues happened, with the exception of some contents on the more traditional outlets. Even when accounting for it all, some level of peaceful disagreement remained, although the space for politics, the compromise between extreme callings and claimings, was only secondary to the surface confrontational dynamic of a cultural war.

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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460X & Print ISSN: 0975-587X

# Invisible Gender Inequality in Rural China: Exploring the Reasons for Son Preference and Daughter Preference

By Huimin Zhang

*Abstract-* Son preference seems to be disappearing in the current discursive environment, replaced by the emergence of daughter preference in social communication. Different from previous studies of son preference in China that focus on quantitative data, this paper is based on an ethnographic study of a remote rural village in Shanxi Province, China. Through the use of participant observation, focus groups, and semi-structured interviews, the paper concludes that patriarchal systems persist, and son preference develops dynamically. Among others, the author concludes that (1) the patriarchal system is a necessary foundation for the existence of son preference, (2) the concealment of son preference is an aftereffect of gender reproductive selection and a major variable of marital stress, and (3) daughter preference is a variant of traditional gender expectations.

*Keywords: son preference, patriarchal system, gender reproductive selection, marital stress, gender expectations.*

*GJHSS-C Classification: DDC Code: 338.1851 LCC Code: HD2098*

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# Invisible Gender Inequality in Rural China: Exploring the Reasons for Son Preference and Daughter Preference

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*Abstract-* Son preference seems to be disappearing in the current discursive environment, replaced by the emergence of daughter preference in social communication. Different from previous studies of son preference in China that focus on quantitative data, this paper is based on an ethnographic study of a remote rural village in Shanxi Province, China. Through the use of participant observation, focus groups, and semi-structured interviews, the paper concludes that patriarchal systems persist, and son preference develops dynamically. Among others, the author concludes that (1) the patriarchal system is a necessary foundation for the existence of son preference, (2) the concealment of son preference is an aftereffect of gender reproductive selection and a major variable of marital stress, and (3) daughter preference is a variant of traditional gender expectations.

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## I. Introduction

With the development of feminist movement and up-to-down implementation of gender equality policy in China, women's positions have been upgraded over time, especially in the public sphere. For example, there are more women in higher education and primary education than their male counterparts in China based on the collected data of Global Gender Gap Report 2020 (World Economic Forum, 2019). At the same time, there are also more than 50% women in the workplace even though women's participation has been reduced since the 1978 Reform and Opening policy (China Briefing, 2016). However, the sex ratio of birth between men and women in China is still skewed, for instance, the sex ratio of birth between men and women is 105.302 to 100, which implies to men still have more 37.17 million than women in 2020 (United Nations, 2021). Behind such a fact, son preference seems to be one of the obvious reasons to understand this gender issue, which was rooted in the Chinese family patriarchal system.

Son preference, by definition, means that people hold the belief that boys have more values than girls, which is an embodiment of gender bias (Jayachandran, 2015; Yan, 2003). In practice, son preference detailly embodies birth-selective abortion and female infanticide. At the same time, families and societies usually consider males to have better achievements than their female counterparts. In China, son preference has existed for a long time in both practice and policy. Meanwhile, the existence of son preference has connected to other current gender issues and biases. In this way, the one-child policy in the 1980s has been the main reason for curbing people's son preference ideology in some researches, even though there were a series of female infanticide and sex-selective abortion in rural China (Hesketh et al., 2011).

Until now, son preference is still a common social phenomenon, even though the changes of women in workplaces, official educational or other policies, and the mechanisation of agriculture have played roles in reducing the ideology and practice of son preference (Murphy et al., 2011). Except for birth selective abortion in one-child policy period, there is a new type of son preference in China, which does not emphasise on only having boys after implementing two-child policy or three-child policy. Conversely, gender expectations and reality have changed the traditional son preference and turned it into a new type in China. Namely, in common sense, women should be treated as protected persons and men as protectors. When referring to birth selection, many would value girls more than boys in modern families. At the same time, there are different upbringing ways for genders, for example, a Chinese proverb says that 'raising a son should be economically and raising a girl should be generously' (窮養兒，富養女). Superficially, the gender inequalities have been changed, or more detailed, current society emphasises girl preference, for example, some families would prefer to have girls rather than boys. When considering this contradictory argument between current gender issues and the so -called "daughter-preference" phenomenon, it is necessary to explore the deeper reasons.

The purpose of this paper is to deeply understand whether son preference has been missed and the behind reasons for daughter preference. This paper mainly contains five parts. Introduction would give a brief social reality of son preference and its development. Literature review concludes the history of gender inequality and son preference in China and its relationships with other factors. Following, this paper

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starts to collect data with ethnographic methods, which focuses on a small village of Shanxi province, China. Based on collected data, the result section and conclusion mainly summarise and provide relative implications and suggestions.

## II. The Brief Review of Son Preference in China

In China, the preference for boys over girls has been around for a long time. Starting from agricultural societies, human societies began to value men due to the increased demand for labour and the differences in the physiological functions of men and women (Das Gupta et al., 2003). In ancient China, which has always been an agrarian society, a small peasant economy with the family as the unit has been the mainstream of feudal society. In this case, more males in the family meant more labour to increase the family property, so the idea of son preference was passed down from generation to generation. As a result, it has a profound impact on family decisions such as fertility, human capital investment, marriage, and savings (Lin et al., 2021).

Son preference is a characteristic of patriarchal family systems in many countries in East and South Asia (Hesketh et al., 2011). In particular, son preference is still closely related to Confucianism (Hesketh et al., 2011). In the ideology of Confucianism, it divides people into different social classes and types. In particular, men and women are strictly divided into two extreme spheres. For example, Confucianism stipulates that women should follow the rule of "three obediences and four virtues". By following such rules, women have no choice to participate in personal, family, or even public decision-making. The way women were valued led to the oppression of women until now.

Later, after the founding of the People's Republic of China in 1949, gender inequality seemed to change. During this period, China's gender policy was influenced by Marxist feminism, and it can be concluded that gender blindness replaced the topic of gender with a program of class liberation (Ferguson, 1997). In the Maoist era, gender policy was of a particularly revolutionary nature. Basically, throughout the Maoist era, women's issues and revolution were closely related. For example, the basic concept of women's policy during this period was that "both men and women are the same" and that "women can hold up half the sky". On the one hand, this policy had the advantage that women were considered equal to men, and they were both subjects who enjoyed many social rights equally. On the other hand, however, it is flawed in that "equality between men and women" requires women to be the same as men, and it presupposes a potentially standard image of the subject as, in effect, male. It is important to note that during the Maoist era, women's domestic work, and especially her gender role, was rarely discussed (Zuo & Bian, 2001). At the same time, another important feature of the Maoist era was that it largely did not reflect patriarchy. In that era, the way society as a whole was structured was essentially a patriarchal structure. Beginning in the 1980s, China began a family planning policy that was essentially designed to effectively control the population, but it also contributed, to some extent, to the development of gender equality in childbearing. For urban households in particular, the imposition of family planning coercive measures led many families to accept a single girl. However, in some provinces, the idea of son preference is equally incorporated into official fertility restriction policies: in rural areas, parents can try again for a boy if the first child is a girl (Greenhalgh, 1993).

Son preference is inherited from patrilineal social networks, family systems, and related sociocultural practices (Murphy et al., 2011). son preference has always been closely linked to agricultural society, and after the reform and opening up, China entered into a multi-sectoral development model, which also contributed to the formation of different work identities. At the same time, the gender choice of parents in urban areas changed significantly during this period due to the juxtaposition of the reform and opening up and the implementation of family planning policies. In addition, as parents' education increased, they had more acceptance of gender equality (Stromquist, 1990). In Wang's (2005) fieldwork, it was found that urban children who lived with educated parents would be less exposed to gender bias in the family.

Also, the presence of son preference affects families' investment in human capital, with families showing a clear son preference in their investment in children's health. For example, son preference leads to shorter breastfeeding times for female infants because mothers are more likely to become pregnant again (Jayachandran & Kuziemko, 2011). Meanwhile, when it comes to gender differences in educational investment, some studies have shown that girls suffer from higher risk of late enrolment and early dropout (Zhou & Yuan, 2014). Also, individual son preference often leads to discriminatory behaviour (Murphy et al., 2011). For example, the availability of sex-selective abortion technology allows parents to act on son preference in a way that is arguably less emotionally costly than postnatal interventions, such as fatal neglect of girls (Murphy et al., 2011). However, research has similarly indicated that son preference and its impact on human capital investment may diminish over time as economies and societies develop (Chung & Gupta, 2007).

In contrast to previous research on son preference, which has focused on quantitative analysis, the merit of this study is to explore the current development of son preference using a qualitative research approach. In particular, this paper focuses on



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questioning the existence of the contradiction between daughter preference and gender inequality and trying to find the answer. Thus, the main questions of this study are:

i. Does son preference still exist today?
ii. What has caused the prevalence of daughter preference?
iii. Do changes in fertility policies allow for the redevelopment of son preference?

## III. Methods

Different from previous research that focused on the quantitative methods, since there is no accurate message about the trends of son preference, in this way, this paper focuses on a deeper understanding in a selected rural China area using qualitative methods. For this research, I mainly focus on a small village of Shanxi province, China. It is in Northern China, which usually is labelled as conservative. A qualitative methodology was adopted in this study in order to gain a deeper understanding of son preference and gender expectation while avoiding culturally and contextually naive generalizations. Data was collected through participation observation and individual interviews. Author chose to engage in the data collection via the process of ethnography. The ethnographic approach has been described as "documenting the invention and decomposition of communities" (Parker, 2004: 36). Ethnographies describe the ideological, behavioural, relational and contextual factors that define these communities (Lofland, 1995). Therefore, the author's intention in using this framework is to detail a specific socio-relational context and make connections to character narrative, ideology, and behaviours. Ultimately, the purpose of this paper is to provide insight into the son preferences and their manifestation in a particular context.

### *a) Context and Participants*

A study of ethnography aims to understand the activities, interests, rules, and styles of interaction of small groups of people (Blomberg et al., 2017). In this study, I have investigated a small town from Shanxi province, China. Data was collected via participation observation, focused group, and semi-structured interviews.

The participants were from a small village focusing on the parents who aged from 20 to 65, which are divided into two generations. Parents between the ages of 20 and 32 were born since the implementation of the family planning policy, and parents between the ages of 40 and 65 were born in the era of having more children, but most of them were the main participants of family planning. The authors' main purpose in investigating these two groups was to see if they differ in patriarchal and gender expectations across age groups affected by the same policy. This study was mainly divided into two phases, in this first phase, the author uses participation observation for data collection. And the second phase, after establishing a closer connection, uses both participation observation, focused group, and semi-structured interviews for 8 households in the small village.

*Table 1:* Methodological Summary

| | Phase I | Phase II |
|---|---|---|
| Location | A remote small village in Shanxi Province, China | |
| Participants | A small village and 8 households for main investigation | |
| Data collection | Participation observation<br>Semi-structured interviews | Participation observation<br>Focused group<br>Semi-structured interviews |
| Analysis | Ethnographic Description | Ethnographic Description<br>Discourse Analysis |

Since the main way of life in this village is based on agriculture, it is a good reason to understand the relationship between agrarian society and son preference in current times. At the same time, based on the reasons for working and studying, the large proportions of young people and labour force of the village have migrated to bigger towns or cities. Usually, these people come back during vacations or festivals. Therefore, this study is divided into two main phases. The first phase occurs in April-May 2022, and the main observation targets are the elderly group in the village. The second phase occurs from July-August 2022, and through the preliminary contact and communication with the village people, the authors have established contact



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with 10 of the households, whose families will have young people coming home to live during the summer vacation, so during this period mainly use the participation observation, focused group, and semi-structured interview to collect data. However, due to the COVID-19 pandemic, two households did not return to the village in this year, so the data for this study relied on the other eight households. At the same time, due to work, some middle-aged people (mainly 20 to 50) in these households only stayed for 1-2 days. In this way, the author mainly uses these two days for semi-structured interviews. Accordingly, it may lose enough evidence to understand deeper thoughts for these parents about their practices.

The author's connection to the village came mainly from a conversation with a migrant worker in the village, and thanks to her help, the author was able to participate in the village and conduct observations and research. Other than that, the author has no contact with the rest of the village's population. The author made the practical leap from outsider to insider depending on the level of familiarity with the participants prior to starting the fieldwork.

*b) Analysis*

In the first phase of the study, author mainly collected the data by using participant observation method, which was mainly included in a notepad. Since author was not fully involved in the village at this stage, author intended to understand the collective management and basic patterns of living together in the village. At the same time, the analytical approach here was primarily ethnographic description. In the current ethnographic research, narratives are considered as reconstructing perceptions of lived experiences and also shaping the identity of characters (Gadd, 2003). The notes in the notebook were read and analysed several times before being condensed into specific themes, and as the main part of the analysis, the narratives were stories that unfolded during the fieldwork, and author identified key and particular phenomena from the data as an accurate description of village life. These ethnographic narratives were able to shed light on the village's shared values, perceptions of gender and their treatment of men and women.

Subsequently, in the second phase, author mainly used a combination of participant observation, focus groups, and semi-structured interviews. After gaining a basic understanding of the village in the first phase, author went deeper in the second phase of data collection through a combination of notetaking and cell phone recordings. Different from previous analysis of ethnographic description, the phase two mainly emphasises the importance of discourse or narratives. Basically, discourse analysis describes the relationship between the individual and society (Denzin, 1997; Edley, 2001). In social discourse, people are represented by mental representations of one another. Discourses are reflected in their language and behaviours. Based on this explanation, it is essential to take the discourse analysis into consideration for better understanding their interactions. In this process, after considering the fundamental situations and culture of this village, it is important to consider their detailed views about son preference and gender.

## IV. Dynamic and Evolving Patriarchy and Gender Inequality

In reference to the manifestation of patriarchy in the new era, current research has shown that the connotation of patriarchy has persisted even though its implement has changed yet. With the implementation of the one-child policy and the popularity of the idea of gender equality, it can be understood through both interviews and focus groups that son preference is usually rarely mentioned in reproductive choices. However, through the current survey in the village, son preference has become an invisible phenomenon, meaning that people rarely directly mention that boys are more valuable than girls, but rather continue the dynamic of son preference in many ways. In short, people still perpetuate gender bias and gender stereotypes ideologically. The current results fall into three following main categories.

*a) Patriarchal Management System*

China still retains a patriarchal system to a large extent, especially in peri-urban or rural areas (Wong, 2016). The village currently retains a traditional patriarchal management system through a participatory survey using ethnography description. The main person in charge of the village is a 55-year-old male, but after the participatory understanding it was found that many things in the village are also communicated and finally decided with other retired males. It is clear that the older men usually have an advantage in the management of the village. In other word, this village inherits a patriarchal system of management. Wang, as the village chief of the village, once answered this question,

> "*Women may have trouble being leaders... They are too emotional... Of course, I don't deny that there are female leaders, but men may have an advantage over women ..... Just like in stress resistance...*"

Similarly, this perception that men have an advantage over women in management comes from women themselves, and is held by women in the same age group as Wang, whose wife Liu (50 years old) believes that women and men are different in many ways, including management skills, "*Gee... Men are really better than us in many ways... There are times when a male is needed to make decisions, which I can't do*." At the same time, when author asked why men and women are different, Liu did not attribute it to social or



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historical reasons, but rather to biological selection or theological reasons, arguing that "*that's how God made people*." Thus, to a large extent, some people have internalised gender inequality into biology itself rather than looking for social or historical attributions.

This patriarchal system of governance at the meso level also continues at the micro level in the household, and in author's interviews and participatory research in the village, author likewise found that women were not usually present at the table when there were guests, and that the younger children in the household were likewise absent. The men acted as the representative of the family at this time to answer or socialise.

*b) Birth Selection Abortion Aftermath and Marital Stress*

As it has mentioned earlier about the current sex ratio, the current problem of passive surplus men has started to become serious, especially for rural areas, and male marriage choice has become a serious issue for some families. Therefore, when author mentioned "Do you have an any preference for having a boy or a girl?" For example, Chang (28 years old) did not state very clearly whether he had a preference or not, but replied, "*A boy can probably carry on my family name. If I could afford it, I would want both boys and girls. But now I can't afford to raise a boy*." It is important to note that seven households in this investigation linked "boys" to "not being able to afford". Wu (55 years old) said this is actually happening in his family, where he has a son who is 29 years old and is having difficulty finding a 'suitable' spouse.

> "*My family lives as farmer, and it takes too much money to get married now... My son has to buy a house for him to get married, otherwise no one will choose to find my son... (I) say it's better to have a daughter... With a daughter, you don't have to worry so much...*"

The different attitudes of families toward sons and daughters in marriage is not a short-term process; for many families, a daughter is not a member of their own family, as she (they) belongs to another family after marriage. At the same time, the marriage ritual popular in the region requires the man to pay a certain amount of bride price (彩禮) and promise fixed assets to the woman before the marriage can be approved by the woman's family. This custom is largely a remnant of the traditional patriarchal society in which two families exchanged women as equivalent property. Even though many families no longer clearly adhere to the son preference attitude, this attitude is actually a compromise in reality.

*c) Daughter preference as a Variation of Traditional Gender Expectations*

Among the families investigated in this paper, the younger generation of parents (20-40 years old) usually have more examples of having two or three children. Four of the younger generation mentioned in this paper were two-child families and one was a three-child family. Zhang (36 years old) and her husband Lin (38 years old), the most affluent of the families author interviewed, referred to them as a "gender equality" and "daughter preference" person and had different standards for sons and daughters.

> "*(I) can't coddle my son, but my daughter can. Everyone knows I love my both kids; my daughter is very sweet. My son can protect his little sister... I cannot treat them same…(I) have different standards for sons and daughters, and the old saying is right, daughters need to be raised rich, sons need to be raised poor. If a son suffers now, he will be able to take responsibility later, and if a daughter is raised rich, she will not be curious about things…Of course, I wish my children can have better achievements in the future.*" (Zhang)

When asked why they had different expectations for sons and daughters, Lin believed that men and women have different tracks in the future. He saw himself as a daughter preference person, and he talked about how he loved his daughter more than his son.

> "*I love my daughter very much, partly because she is still very young (3 years old), and partly because I think when a girl is loved enough in her family of origin, she won't have low self-esteem in society or in her future in-laws... Of course, I also love my son, but he needs to take the responsibility of the family in the future, and I hope he can protect his sister and can make his mother and me not to worry*."

When it comes to gender equality, it is undeniable that attitudes towards boys and girls are now gradually changing. For example, families no longer mention the contrasting value of boys and girls but begin to think of them as having shifted from son preference to daughter preference. As Lin mentions that he loves his both kids and he want his daughter can have confidence through raising her generously. However, based on the analysis of the discourse, it is clear that Zhang and Lin have different expectations of their two children, believing that boys need to take responsibility, while girls should be protected. To a large extent, the ideology of "men as breadwinners, women as housekeepers" has been transformed into different gender expectations for boys and girls. Ultimately, the current so-called daughter preference is just a variation on traditional gender expectations.

## V. Conclusion

Son preference has long been an issue of gender inequality in China, and previous research has focused on both sex-selective reproduction and educational preferences. In the context of the current development of gender perceptions in China, son preference has always been dynamic and perpetuates patriarchal social perceptions. While the patriarchal system has been the main framework of the family and



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society, the social structure under the patriarchal system is also changing dynamically to adapt to the development of modern society. In this paper, in order to gain a deeper understanding of the existence and changes of son preference, which focuses on a remote rural village in Shanxi Province, China, the author uses ethnographic methods such as participant observation, focus groups and semi-structured interviews to gain insight into the reality of the village. From the results, both ethnographic description and discourse analysis, the authors conclude that the village has traces of a patriarchal system, such as the common belief that men and women need to work in different occupations, and that men tend to have a greater advantage than women in leadership. The reasons for the gender division of the different occupations are not attributed to social and historical reasons but are considered to be inherently different for males and females.

In addition, son preference is shown to still exist in this study, but it is not expressed in an obvious way. No interviewees in this study directly suggested that they were son preference, but rather many families reported that having daughters was better than having sons. In understanding the specific reasons for this, the authors found that some families believed that having a daughter was better than a son because having a son required a greater investment in human resources, especially since the persistent skewed sex ratio had created a problem of marital stress for men. Although women appear to be on the initiative side from this result, in reality they are still the ones who lack a voice in the price negotiations between the two families. In other words, the current freedom to marry is still the result of the involvement of two families. Therefore, at the root, the family is not aware of gender equality, but rather connotes son preference by making compromises in real life.

Finally, in understanding the causes of what is currently called daughter preference, the authors recognize that daughter preference is only a variant representation of traditional gender expectations. In this daughter preference meaning and representation, women are defined as the protected and men as the protector under the family structure at the beginning. When parents position boys and girls in different roles, they assign more responsibilities to boys than to girls from an early age. And the different gender expectations are more behind the position of males as the main participants and heads of family and public affairs.

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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460X & Print ISSN: 0975-587X

# The Lost Heritage of Koryoin: Citizen or Outcast?

By Jungmin Yoo

*Introduction-* The icy winds of the Baltic bite deep into the bones of barely-clothed prisoners of an unnamed war camp. The cold is unbearable in the frigid Prussian hinterlands, the chatter minimal, and everyone is huddling to survive. Amidst the stale air of death and starvation, small clouds of melodic choir powerfully pierce through the hushed chill: "Ari-rang, ar-ri-rang, ara-ri-yo…"[1] From the bellies of a group of Koryo Saram, the Korean folk anthem wistfully winds its way through the barbed wires, straining to reach back home.

In a curious, seeming oddity, ethnic Koreans, Koryoin, found themselves conscripted from the Far Eastern regions to fight for the Russian Empire thousands of miles away on the Eastern Front of World War I. During a particularly brutal beatdown at the Battle of Tannenberg, a lethal saber thrust into the heart of Russian Northwest forces, 4,000 ethnic Koreans[2] were among the 90,000 Russian soldiers taken as prisoners of war.

A small minority of these Koryo Saram, or Koryoin, would soon be afforded some warmth at Humboldt University, where German linguist Dr. Wilhelm Albert Döggen studied their language and music.

*GJHSS-C Classification: FOR Code: 160899*

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# The Lost Heritage of Koryoin: Citizen or Outcast?

Jungmin Yoo

## Introduction

The icy winds of the Baltic bite deep into the bones of barely-clothed prisoners of an unnamed war camp. The cold is unbearable in the frigid Prussian hinterlands, the chatter minimal, and everyone is huddling to survive. Amidst the stale air of death and starvation, small clouds of melodic choir powerfully pierce through the hushed chill: "Ari-rang, ar-ri-rang, ara-ri-yo…"[1] From the bellies of a group of Koryo Saram, the Korean folk anthem wistfully winds its way through the barbed wires, straining to reach back home.

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A small minority of these Koryo Saram, or Koryoin, would soon be afforded some warmth at Humboldt University, where German linguist Dr. Wilhelm Albert Döggen studied their language and music. Dr. Döggen borrowed a few Korean singers for an anthropological study, recording 59 albums of these four men, including a young, 27 year-old Gregory Kim.[3]

Gregory seemed to be of especial interest, as he wrote his own introduction in the book and article released on the study. A Buddhist nationalist fighting for Korea's independence from the Japanese yoke, and father of two,[4] Gregory relates his life through this rare first-hand narrative. Born in Nikolsk Ussuriysk, Russian Far East, Gregory learned Russian at 17 or 18 and signed up for the army at the ripe age of 21.[5] Once his service was done, he returned to his hometown to start life with Kim Bok and Kim Saet-Byul, his son and daughter, only to be called up for service when war broke out a few months later.

Almost no information exists as to his life after his imprisonment. Perhaps he died. Perhaps he lived a long life back in Nikolsk with a thriving family. What we know for sure is that Gregory was constantly fighting the pangs of hunger and chill of death to sing the Arirang and become a recorded artist of sorts, and some of his albums are now preserved at Mungyeong Old Road Museum.[6]

Gregory Kim's Korean name is Kim Hong-Jun, and he was a third-generation Koryo Saram.

## I. The Origins of Koryo Saram

In the 19th century, after centuries of stability and isolation under the Joseon Dynasty, the Korean Peninsula began to experience tectonic shifts. Internally, the kingdom was suffering from stalled development and growth with extreme social and economic stratification. The *yangbans*, or the Neo-Confucian scholar-aristocrat class, controlled most of the land and were busy exploiting the population, while nearly 90% of Koreans were either slaves, farmers, merchants, or other "lowly" professions.[7] Safely nestled under the Ming Dynasty, Joseon was complacent and did not strive to reform its static society; idling and trivial in-fighting were rampant, as they were in Ming, which also led to its downfall. Meanwhile, Russia was expanding its borders and Japan undergoing dramatic modernization following the 1868 Meiji Restoration.

During the mid-19th century, Joseon economy was in ruins: "wages and rents fell, tax receipts shrank, and budget deficits expanded, forcing the government to resort to debasement."[8] Poor peasants emigrated north from what was then the Joseon Dynasty to Northern China and Primorsky Krai, located in the far-flung eastern regions of Russia.[9] After the annexation of Korea by Japan and the Russo-Japanese War (1904-1905), many more fled the war-torn peninsula. Although the Russo-Japanese borders were strictly controlled, Koreans still illegally migrated to Russia through the Tumen River. In 1908 alone, over 60,000 ethnic Koreans settled in Primorsky Krai.[10]

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[3] *Ibid.*
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[10] *Ibid., 21.*



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As emigres, these Koreans began to distinguish themselves from the rest of the population by calling themselves *Koryo Saram*.[11] The word *Koryo* refers to the historical 12th century Korean dynasty, and *Saram* or *it means* 'people' or 'person' in Korean. *Koryo Saram* was, therefore, an identifier, to denote that 'I am of Korean descent.'

## II. Life in Soviet Russia

Koryo Saram were Korean expatriates, who "have common genetic roots, and are of the same anthropological type, and share a culture and language"[12] as Koreans now. But as with all diasporas, Koryoin lives began diverging from those in the Peninsula, and they began to carve out their own unique identities and histories.

Because of the burgeoning Korean population in the East, the Governors of the Soviet Union announced the "Korean Question" and decided to forbid any more Korean immigrants from residing in Russia.[13] As a consequence of this policy, Korean communities were split up and sent to different territories around Primorsky Krai, leading to many losing their lands, which were taken by Russian settlers.

On August 20th, 1888, the "Russian-Korean Convention on Border Relations" was signed, dividing Koreans into three different groups: first, Koreans who resided in Russia before the Russo-Korean agreement of 1884, which allowed them to obtain Russian citizenship; second, Koreans who settled after 1884 and sought Russian citizenship; and third, Koreans who temporarily lived in Russia through short-term labor contracts.[14]

There were relatively more Koreans who did not obtain Russian citizenship than those who were able. Despite this, due to the outbreak of the Russo-Japanese War, Soviets began to mistrust Koreans. Pavel Unterberger, the Priamur Governor-general, was particularly skeptical of Koreans once Japan annexed Korea in 1910. Unterberger and other governors in Russia considered Koreans untrustworthy and even mistook some of them as Japanese spies.[15] Eventually, Korean settlers were kept under strict control, while some were even deported.

However, most Koreans did not want to give up on their residency in the Soviet Union. To earn back trust, Koryoin conscripted themselves in the Red Army during the 1917 October Revolution.[16] Korean workers believed that through this action, all oppressed Koreans could gain freedom and independence in Russia. Nevertheless, the situation worsened: two-thirds of Koreans were not granted Russian citizenship; statistically, only 1,300 out of 6,000 Koreans received citizenship.[17] Most Koryo Saram were left stateless.

However, that was just the beginning of their entangled history. In 1937, Stalin deported all the "aliens"—a term he used to refer to all foreigners—living in the Soviet Union on "ghost trains," a name the Koryo Saram invented because the suffocating month-long ride that killed millions of people,[18] sort of like the Soviet Trail of Tears. In a first-hand account, Aleksander Leonidovich, a Russian surveyor, wrote that "people buried their relatives in every single car," and that "although sometimes [they] could stop to bury them, most of the time [they were] forced to just throw the bodies away."[19]

During that suffocating ride, Koryo Saram were abandoned in Kazakhstan and Uzbekistan; around 100,000 were settled in Kazakhstan and 74,000 in Uzbekistan.[20] As Stalin's aim was to destabilize foreign enclaves, the territories had no food or shelter, so people had to dig special holes underground called *zemlyanka* (earth hut) to survive the freezing winters. Stalin also banned all Korean education, such as language and culture, in an effort to stamp out any traces of non-Russian identity. Therefore, Koryo Saram began to gradually lose the pieces that tied them back to their homeland.

## III. The Korean Way

Tenaciously, ethnic Koreans tried to hold on to their essence as Koryo Saram by a variety of means, including taking political offices in an attempt to overturn stifling policies. The official turning point came in 1953, the year of Stalin's death.[21] Although the USSR existed, Koryo Saram were able to flourish within a much more liberalized political regime. Through their organized petition for national rehabilitation, the USSR government permitted the work of strengthening the educational and cultural system of the Koryo Saram. By the 1970s, Koryo Saram worked for key industries and educational institutions.[22] Moreover, they were "elected to the

[11] *Ibid, 21.*
[12] Ember, Melvin, Carol R. Ember, and Ian A. Skoggard. *Encyclopedia of Diasporas*. New York: Kluwer Academic Plenum Publishers, 2004.
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[15] *Ibid., 24.*
[16] *Ibid.*
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[20] Ю, Чонмин. "Treading the Water for an Identity." Молодой ученый. Издательство Молодой ученый, November 16, 2020, https://moluch.ru/archive/336/74957/.
[21] Kim, German Nikolaevich. "Koryo Saram, or Koreans of the Former Soviet Union."
[22] *Ibid.*



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parliaments of the Soviet Union and the Central Asian republics," "given ministerial posts in Kazakhstan, Uzbekistan, and Kyrgyzstan, and were also found among the generals of the Soviet army."[23] The population of Koryoin bourgeoned in the Commonwealth of Independent States (CIS), former Soviet Central Asian and East European countries, now standing at around 493,000, mostly in Uzbekistan, Russia, and Kazakhstan.[24]

However, while they flourished in the post-Stalin USSR and synthesized aspects of Slavic culture, Koryo Saram continued to nurture their deep attachment towards their motherland. The Korean language was known as *Koryo-mal*, which simply means the Korean language.[25] Although they learned and spoke Russian, they also consistently spoke *Koryo-mal* because they retained the long-lasting dream of returning to their home. *Koryo-mal*, however, stems from the language spoken during Joseon-era Korea—when Korea was united. In Korea, *Koryo-mal* has altered over time to the modern-day Korean language, which is different on both sides of the peninsula's border.

Koryoin also celebrated all Korean holidays such as *Seollal* (**설날**), Korean New Years and *Chuseok* (**추석**), Korean Thanksgiving. They even kept traditions for weddings and funerals, such as wearing white hanboks during funerals. However, as time passed, the traditions of Koryo Saram and modern-day Koreans diverged to a certain extent. For example, Koryo Saram wedding attires in Russia were altered to mix traditional Korean hanbok with hints of traditional Russian design.[26]

Koryo Saram culture flourished, and the Communist Party published many collections in diverse mediums, such as poetry, books, and newspapers by which the Koryo Saram maintained their unique identity and developed a strong sense of unity through the Korean language—*hanguel* (**한글**). Some significant poems include *Oseon Poetry* (1958), *October Sunlight* (1971), *Homeland of Happiness* (1988), and *The Land Where Flowers Bloom* (1988).[27] All of these publications depict Koryoin's fragile identity, the "fear and hatred of the other [Koreans]," and "preserv[ed] the culture and identity of people struggling to survive away from their homeland."[28] One of the poems, "A Leninist Song of Friendship,"[29] was written by Boris Park to emphasize Lenin's saying that Russia should maintain a good friendship with the Koreans and local indigenious people.[30] As such, Koryo Saram's internal struggles expressed through *hanguel* was their only way to "appease their souls" and "distraught with nostalgia."[31]

## IV. The Hermit Kingdom's Closed Doors

The attachment to their home had an ultimate goal: return back to Korea. As such, many Koryoin rejected USSR citizenship and "opted to remain stateless."[32] To this day, many remain stateless, without legal protection from any country, placing them in a precarious liminal space, living as ghosts that are open to exploitation.

Around 50,000 Koryo Saram have repatriated to South Korea[33], but to hostile conditions that don't accept them as fully Korean. Just as they themselves blended in Russian culture and changed, Koreans have undergone rapid and dynamic shifts "in their mentality, ethnic identity, language, customs, cuisine, and even appearance."[34]

In 1989, the Soviet Communist Party's Committee created a "friendship village" following the fall of the Berlin Wall.[35] The friendship village was envisioned by the committee as an experiment to see how South Korea might act or behave should Koryo Saram be reunited with their compatriots in the Peninsula.[36] Unfortunately, the experiment was seen as a failure, as South Korean entrepreneurs highly detested working with Koryo Saram, who they believed to be lazy compared to the Koreans back home. Was this attributable to stereotypes of "impurity" or a harsh dose

[23] *Ibid.*
[24] Hong, Min-Oak. *Exploring Factors on Identity of Korean Diaspora in the CIS Countries*. KDI School of Public Policy and Management, December, 1 2020,
[25] Kim, German. "Korean Diaspora in Kazakhstan : Question of Topical Problems for Minorities in Post-Soviet Space." Academia.edu, January 1, 2003, https://www.academia.edu/64002465/Korean_Diaspora_in_Kazakhstan_Question_of_Topical_Problems_for_Minorities_in_Post_Soviet_Space.
[26] New World Encyclopedia. (n.d.). *Koryo-Saram*. Koryo-saram - New World Encyclopedia. Retrieved January 23, 2022, from https://www.newworldencyclopedia.org/entry/Koryo-saram
[27] Joseph, Agnel, ed. Korean Literature Now. Accessed January 11, 2022, https://www.kln.or.kr/.
[28] *Ibid.*
[29] This poem was published together with the poem, "The Land Where Flowers Bloom" in the Kazakhstan Almaty, Sasutt Publishing House.
[30] World Korean Cultural Exhibition. "A Leninist Song of Friendship." **세계한민족문화대전.** Accessed January 11, 2022, http://www.okpedia.kr/Contents/ContentsView?localCode=cis&contentsId=GC95301281.
[31] Joseph, Agnel, ed. Korean Literature Now.
[32] Jeewon Min, Jewoo Lee. "Legislation on Migration, Residence, and Citizenship: Ethnic Koreans (Koryo-in) in the Former Soviet Union, Russia, Uzbekistan, Kazakhstan, and South Korea." Migration Research and Training Centre, December 2019, https://www.mrtc.re.kr/business/business02_2.php?admin_mode=read&no=581.
[33] Kim, Byung-Hyuk. **이주 고려인의 서울 정착을 위한 대책.** The Seoul Institute, January 3, 2018, https://www.si.re.kr/sites/default/files/2018-CR-01-03_0.pdf.
[34] Ember, Melvin, Carol R. Ember, and Ian A. Skoggard. *Encyclopedia of Diasporas*. New York: Kluwer Academic Plenum Publishers, 2004.
[35] **Кожин, Сергей**. "Peace, Friendship, Projects." **МК Владивосток**, November 9, 2010, https://vlad.mk.ru/articles/2010/11/10/544673-mir-druzhba-prozhektyi.html.
[36] *Ibid.*



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of reality, as the Miracle on the Han River[37] was sparked by an intense work culture?

We will never know what went through the minds of those businessmen, but over the years, Korea has become even more constrained in its idea of nationness. Despite their effort to assimilate to the community through shared language and culture, most immigrating ethnic Koreans are considered 'aliens.' To South Koreans, the multiple generations abroad can be a marker of "tainted" blood, similar to Imperial Spain's Casta system and the perception that Peninsulars, or Europeans born in Europe, were superior to Creoles, Europeans born in the Americas.

A concept that developed after the Korean War (1950-1953) is *minjok*, defined as "one country, one people, and one language," and the term that derives from it—"*Danil Minjok,"* which means "one blood."[38] Yet, despite sharing ancestry, modern-day Koryo Saram do not quite fit in Korea's confined idea of *minjok*: people were present during Korea's modern history and grew together from the ashes of a devastating war. Furthermore, although first-generation Koryoin can be considered ethnic Koreans, the second and subsequent generations were born in Russia, with some being mix-blooded, and are therefore considered as foreigners. This is evidenced by a 2016 study, where less than half of Koreans considered North Koreans as "one of them" or "brothers," with the younger generation especially identifying less with their Northern compatriots.[39] People who have lived for decades, if not over a century, thousands of miles away fare even worse.

South Korea's unacceptance towards Koryoin tends to occur because the country has never been receptive to multiculturalism. South Koreans might be tolerant of different cultures, but that does not "translate to greater support for specific ethnic Korean groups," and Koreans still remain "hesitant to accept the notion that co-ethnics should all live in one state."[40] There are many theories as to why, but the core reason is the competitiveness of the nation. South Korea is one of the world's most densely populated countries.[41] Many Koreans believe that Korea is a strong nation because the relatively small amount of opportunities for a large number of people drives out the best in each individual, allowing the nation to be competitive despite its small size relative to other countries.[42] Most South Korean students, therefore, spend 16 hours at school and after-school academies called *hagwons*.[43] The competition for top universities is extreme, and students often describe the system as "stressful, authoritarian, brutally competitive, and meritocratic."[44] In such a dog-eat-dog world, the addition of Koryoin means more people, meaning more competition for jobs and schools, which makes it even harder for South Koreans themselves to survive in their country.

*'Succeeding to make the nation a better place'* has been a common saying for many Korean generations. This specific motto came into existence during the post-Korean War when South Korea was not industrialized or developed. Therefore, many senior citizens tend to assert that it is the responsibility of the future generations of Korea to brighten the future of the nation. Following that motto, younger generations became focused on their country's achievements, gradually leading them to prefer a closed, tightly-knit community. This behavior makes the Korean public tentative about accepting people who wish to settle in South Korea, a country that they themselves built and are proud of, that "Korea was born to life exclusively by the work of Koreans and no one else"[45]; any foreigner is then seen as simply reaping the benefits of Korean blood, sweat, and tears. This social unacceptance extends even to Koryoin who already reside in South Korea, who are "othered," heavily discriminated against, and can only work menial labor[46].

The Korean public's hesitancy causes the government to promote stricter immigration laws and programs, making adjustment to life in Korea even more difficult for Koryo Saram. Accordingly, although some ethnic Koreans received visa privileges to reside in the country, most visas do not last long because policies keep changing over the years.[47] First and second generation Koryo Saram have gained citizenship and visas, but South Korea has stiffened its policies toward the third and fourth generations; fourth generationers are not guaranteed to receive citizenship, even if their parents are Korean.

[37] The Miracle of Han River refers to the period when South Korea achieved rapid economic growth after the Korean War. This is when South Korea transformed from a developing to a developed country.

[38] Ю, Чонмин. "Treading the Water for an Identity." Молодой ученый. Издательство Молодой ученый, November 16, 2020, https://moluch.ru/archive/336/74957/.

[39] Denney, Steven. "South Korean Identity: The Return of Ethnic Exclusivism?" *Sino NK*, October 30, 2016, https://sinonk.com/2016/10/28/south-korean-identity-the-return-of-ethnic-exclusivism/.

[40] Rich, Timothy S. "What Influences South Korean Perceptions on Immigration?" The Diplomat, October 5, 2020, https://thediplomat.com/2020/10/what-influences-south-korean-perceptions-on-immigration/.

[41] World Population Review. "South Korea Population 2021 (Live)." South Korea Population 2021 (Demographics, Maps, Graphs), 2021, https://worldpopulationreview.com/countries/south-korea-population.

[42] "Education in South Korea." WENR, July 16, 2021, https://wenr.wes.org/2018/10/education-in-south-korea.

[43] *Ibid.*

[44] *Ibid.*

[45] Ko, Jun-tae. "I'm Korean, You're Not, and There's a Fine Line You Can't Cross." Stanford University Freeman Spogli Institute, Sept. 22, 2021, https://fsi.stanford.edu/news/us-and-them-i%E2%80%99m-korean-you%E2%80%99re-not-and-there%E2%80%99s-fine-line-you-can%E2%80%99t-cross.

[46] Jo, Mi-Jeong. "Koryo Saram in South Korea: 'Korean' but Struggling to Fit In." Korea Expose, July 17, 2018, https://www.koreaexpose.com/koryo-saram-from-central-asia-and-russia-struggle-in-south-korea/.

[47] Jeewon Min, Jewoo Lee. "Legislation on Migration, Residence, and Citizenship."



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Nevertheless, the Korean government, to a certain extent, has put in the effort to modify some of its existing immigration policies to help ethnic Koreans through more flexibility within specific policies. For example, in mid-2019, an amendment was made by removing some restrictions and allowing "lineal descendants" to be "entitled to the status of overseas Koreans regardless of generation."[48] However, ethnic Koreans who are stateless have "not been considered de jure 'overseas Koreans.'"[49] Therefore, "they are not eligible for an Overseas Visa (F-4) or a Working Visa (H-2)," which means that they are not allowed to apply for Korean citizenship either.[50]

## V. A Place to Call Home

Things aren't much better in former Soviet countries, and Koryo Saram are like stray dogs, facing discrimination in both Russia and Korea. Almost 80% of the individuals who took a public survey conducted in 2020[51] claimed that they faced discrimination from Russia and Korea, with 60% of the discrimination due to their lack of distinct national identity. Some of the experiences were caused by their appearances. In Russia, Koryo Saram were often called **Узкоглазая** ("narrowed-eyes"), and *nerus* ("non-Russian").[52] In Korea, Koreans glared at them for no reason, and despite their fluency in Korean language, Koreans continued to treat them as foreigners.

Take Yu Sasha as an example. Yu Sasha is a 10th grader and 4th generation Koryo Saram interviewed on a YouTube channel called Korea Expose.[53] In the interview, Yu Sasha wondered why citizenship or residency is not provided to the 4th generation; he asserts that he is "also a Koryo Saram, so it feels like discrimination" as only up to the 3rd generation is considered as Korean.[54] In spite of this discrimination, Yu Sasha, along with the majority of the those who answered the public survey, say that their hearts belong to Korea.[55]

It is ironic that Koryoin face the most discrimination in the two communities in which they are supposed to feel most welcome. It seems that they are lost, neither here nor there. So what should they identify as? When the USSR collapsed in 1991, Koryo Saram were able to rally again to build their national identity: some as Russians, some as Koryo Saram, but mostly as Koreans. Even with this opportunity, however, they could not settle in a specific identity group, as a result of their complicated and long immigration history.

Various social theories can be applied to the Koryo Saram situation. Sociologists have pointed out that ethnicity can be seen in different ways: primordialism, which stresses common blood, history, and territory;[56] constructivism, which stresses common myths, group identity, and solidarity;[57] and instrumentalism, which combines primordialism and constructivism to argue that groups can choose the ethnicity that benefits them the most.[58]

With these ideas in mind, Koryo Saram can potentially fit into all of them, but simultaneously none of them as well. The first generation of Koryo Saram can fit into the category of primordialism since they have common ancestry, history, and country of origin with modern Koreans. However, as generations go on, they tend to share a mix of Russian and Korean blood and/or culture and history, and primordialism does not capture this synthesis. As for constructivism, Koryoin still share common myths like Jeosung Saja who are the Grim Reapers that Koreans believe to be afterlife messengers, but group identity and solidarity are not quite aligned.[59] Instrumentalism is perhaps most fitting for these stateless peoples, though they currently are constrained in acquiring citizenship in Korea.

Another social scientist, Robin Cohen, identifies the ethnic idea of homeland through solid, ductile, and liquid forms.[60] While solid indicates native land and origin, ductile refers to a place that triggers a sense of belonging. Lastly, liquid means the desire for a home. Intriguingly, once again, the Koryo Saram fall into all but none of them. In fact, it is quite ironic that they consider Korea as their origin yet the country rejects them and they simultaneously feel a sense of belonging and

[48] *Ibid.*
[49] *Ibid.*
[50] *Ibid.*
[51] This public survey was taken through Google Forms, which was posted on multiple social media platforms such as facebook, *Vkontakte.ru, and Odnoklassniki*, specifically to Koryo Saram communities. This public survey was collected by myself and Professor **Екатерина Рыбакова**, a professor at Saint Petersburg University. The form had over 52 responses.
[52] **Ю, Чонмин**. "Treading the Water for an Identity." **Молодой ученый**. **Издательство Молодой ученый**, November 16, 2020. https://moluch.ru/archive/336/74957/.
[53] KoreaExpose. "Koryo Saram: 4th Generation Redefines Korean 'Roots'." YouTube, September 21, 2018, https://www.youtube.com/watch?v=Eh8IMNhqbLE.
[54] *Ibid.*
[55] 'Korea Expose' has been running a YouTube channel since 2014 along with its website, which all mainly focus on showing Korea through different media: essays, videos, podcasts, and documentaries.
[56] "Primordialism." Wikimedia, December 18, 2020, https://en.wikipedia.org/wiki/Primordialism.
[57] McLeod, Saul. "Constructivism as a Theory for Teaching and Learning." Simply Psychology, January 1, 1970, https://www.simplypsychology.org/constructivism.html.
[58] Guadeloupe, Francio, and Yvon van der Pijl. "Imagining the Nation in the Classroom: Belonging and Nationness in the Dutch Caribbean." European Review of Latin American and Caribbean Studies, March 22, 2015, https://www.academia.edu/11586741/Imagining_the_Nation_in_the_Classroom_Belonging_and_Nationness_in_the_Dutch_Caribbean.
[59] YoonSsam. "8 Interesting Korean Myths." uBitto Blog, January 9, 2020, https://blog.ubitto.com/culture/8-interesting-korean-myths/.
[60] Cohen, Robin. "Solid, Ductile and Liquid: Changing Notions of Homeland and Home in Diaspora Studies" QEH Working Paper Series, 2008, https://core.ac.uk/download/pdf/6759343.pdf.



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detachment. Furthermore, even if they desire for a home, their decisions and desires are relatively irrelevant and weak compared to those in Korea and Russia, who have the power to accept or deny them.

Since the Koryo Saram left Korea so long ago, it now seems, for both the Koryo Saram and Koreans, as if they are close yet distant from each other, the degree to which these two co-exist depending on the generation. But it is clear that what Koryo Saram in general believed to be a continued and firm nationality has, in fact, diminished long before the Korean War occurred, long before what they call United Korea collapsed, and long before North and South Korea began to live in completely binary environments. The "linguistic, cultural, and psychological distance" between modern South Koreans and Koryo Saram has elongated over a long time, making it harder for the Korean community to willingly accept Koryo Saram and for Koryo Saram to seamlessly adapt into Korean society.[61]

Natsuko Oka, an ethnicity and nationalism scholar with expertise in Khazantan, states that "after more than fifteen years of contact with their South Korean compatriots, the Koreans in Kazakhstan (Koryo Saram) have realized that they have a different culture and mindset."[62] In addition, her study asserts that "some of the attitudes of South Koreans caused negative reactions among the minority."[63] Therefore, even if Koryo Saram were granted citizenship, the citizenship would be meaningless; citizenship will provide a legal identity but will not guarantee them a personal identity and sense of belonging.

## VI. Forging a Unique Identity

Though many Koryoin, especially the fourth generation, question the morality of Korea's behavior, they still unwaveringly believe in their Korean identity. To the Koryo Saram, they and the Koreans are still firmly rooted and attached to the same tree, which gives them a straggling branch of hope—that one day they will be treated equally not as foreigners but as Koreans.

This internal feeling of unity that people feel towards the nation, or what political scientist Benedict Anderson calls the "interiorized feeling of (nation)-ness," propels Koryo Saram to seek their motherland like an unrequited lover.[64] In this sense, Koryo Saram exhibits "self-sacrificing love" and "the cultural products of nationalism show this love very clearly in thousands of different forms and styles".[65]

In the modern era, Koryo Saram have effectively utilized newly available mass media social platforms to express their nationalism. Well-known communities exist on Facebook and on two Russian networks, *Vkontakte* and *Odnoklassniki*. On Facebook, many Koryo Saram have formed small communities, such as *Ansong Neri Korea For All*, and *Koryo-Saram Research Network*. Though small, members are highly active. For example, *Koryo-Saram or Koreans of the CIS* is a public group of Koryo Saram with around 22,000 members[66] that welcomes anyone interested in Korean and Russian culture; they do not necessarily have to be Koryoin, Korean, or Russian. It is an open forum that updates recent information about the Koryo Saram community and upcoming events held in other Korean or Russian organizations. Youtube is also a popular medium. *VEKS* is a channel that introduces content based on the history and culture of the Koreans of the CIS, and showcases documentaries on different diasporic Koreans and biographical sketches produced by South Korean journalists and social scientists.[67] "*Koryo*"-*Interactive Kore-saram community* is an all-inclusive social media branch of the website called *Koryo Hope* with around 13,000 members[68] that focuses on Korean diasporas all over the world and makes effective use of modern technology by branching out to larger platforms like Facebook and *Odnoklassniki.ru*. These social media platforms have allowed Korya Saram communities in Russia and abroad to speak for their identity and create safe, inclusive borderless enclaves where Koroyin can freely discuss issues and inform people about their unique history and culture.

While these communities connect Koryo Saram from countries all over the world, there are distinct platforms in both Russia and Korea that serve a much smaller, tighter-knit community of Koryo Saram. On *Vkontakte.ru*, a widely used Russian social media platform similar to Facebook, Koryoin gathered to create a "virtual enclave" that serves the group's central belief that "wherever [they] lie, no matter how long [they] part, despite the time and borders, [they] remain one people."[69] This shows their understanding of their identity as Koryo Saram, who they believe have "one root, one ancestor, one story."[70] This open group aims

[61] Oka, Natsuko. "The 'Triadic Nexus' in Kazakhstan: A Comparative Study of Russians, Uighurs, and Koreans." Semantic Scholar, 2006, https://src-h.slav.hokudai.ac.jp/coe21/publish/no9_ses/19_oka.pdf.
[62] *Ibid.*
[63] *Ibid.*
[64] O'G, Anderson Benedict R. *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London: Verso, 1991., 146
[65] *Ibid.*

[66] https://www.facebook.com/groups/108681204241
[67] Similarly, *"Ansong Neri Korean for All"* is a Facebook community, which is also open for anyone interested in the Koryo Saram. However, compared to *Koryo-Saram or Koreans of the CIS, Ansong Neri Korean For All* has much fewer members. It functions more like a free group that allows the people to post anything interesting rather than strictly focusing on the culture and stories of the Koryo Saram.
[68] https://www.facebook.com/groups/koredo.
[69] "Russian Koreans – Корейцы СНГ – 고려사람." VK. Accessed January 9, 2022, https://vk.com/koryosaram.
[70] *Ibid.*



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to preserve Koryoin identity and values through story-sharing.[71]

Similar to Russian platforms, Korea itself has a few Koryoin-focused and -led social media groups. *Numeo,* for example, is a Korean organization that has been actively helping the Koryo Saram since 2011.[72] *Numeo* mainly focuses on cultural aspects such as language, traditions, and socialization. Since Koryo Saram that are the most active on the internet are teenagers or young children, *Numeo* takes a pedagogical approach by teaching these demographics essential skills and knowledge related to their background, so that the next generations don't lose these pieces of their history and themselves.

A more formal approach is *Koryo Ilbo*, an online publication created by a partnership between the Republic of Kazakhstan and the Republic of Korea, as they both recognize the importance of multiple perspectives. The site serves as an information hub, translating and broadcasting current news, informing people about the two countries, and notifying readers about the economic and cultural programs active in both communities. The most innovative aspect of the site is that it translates Russian news into Korean and Korean to Russian, which broadens its reach.

These are just a few of countless active communities trying to spread the identity of Koryo Saram, which has largely branched out from the internal feeling of belonging and nation-ness. When looking closely at the behaviors and patriotic attachment of the Koryo Saram, it is clear that they still hold a deep love for their roots, the country, culture, language and the people. Generations after Gregory Kim, the yearnful yodeling continues to reverberate in cyberspace.

## VII. Lessons from Israel

While so much effort has been put in by the Koryo Saram, no significant changes have been made to improve their lives. Many still do not have Korean citizenship or any legal status in a specific country. Although challenging, devising a compromise acceptable to both Koryoin and Korea can be met.

Israel was able to handle a similar situation by assessing the issue from multiple perspectives and taking approaches that did not harm either their citizens or the ethnic Jewish applying for citizenship. Otherwise known as the Jewish Diaspora, the Jews were dispersed outside of their ancestral homeland, Israel, for over two thousand years. However, in 1950, Israel passed The Law of Return, a policy whereby the State of Israel granted immediate citizenship to overseas Jews if they "simply show up and request to be Israeli citizens."[73] This was a historic step taken because the law was passed unanimously by Israel's Parliament. David Ben-Gurion, the prime minister of Israel, stated that this law reaffirmed the right that Jews already retained because the "connection between the Jewish people and the homeland"[74] had never been broken. Because of this strong connection, wherever they were from and however long they were apart, Jews were permitted to settle back in Israel.

In 1970, Israel permitted citizenship to even non-Jewish people who had Jewish parents or even grandparents, which made Israel a haven and the homeland of the Jewish people and their descendants. In this sense, the Act is a metaphorical monolith of a solidified Jewish identity worldwide, that all Jews are the same people and can go back to their home whenever they want. Furthermore, by establishing a legal avenue for ethnic Jews to settle in a country, the Act gives access to fundamental human rights such as the right to work, health insurance, and education.

Israel's actions can serve as examples to South Korea, which has been slow to implement accommodative policies to help those who once shared the same history and blood. South Korea does not provide any more citizenship to Koryo Saram and the granting of visas has dropped significantly low as well—even to those who have parents with Korean citizenship. Legislation like the Law of Return may be challenging in Korea because the country is still unfamiliar with accepting immigrants or the ideology of multiculturalism. However, although enacting similar policies would be a difficult step for South Korea, doing nothing would be worse than taking the risk—it would still be a step forward for South Korea and the Koryo Saram, who have constantly been fighting for somewhere to belong. If Korea can progressively work towards inclusion, it can, like Israel, act as a beacon for anyone with Korean blood and truly illustrate to the world that Koreans, too, are a strong, unified peoples, a pride that Jews around the world share.

## VIII. Conclusion

Happening to be born American, Chinese, Korean, or French is rather arbitrary or unchosen. None of the seven billion people worldwide chose to become *something-an* or *something-ese*. However, things are slightly different when we deal with the term 'nation-ness.' Nation-ness is a cultural and political concept that ties people with a nation through a sense of belonging,

[71] *Odnoklassniki.ru* is very similar to *Vkontakte.ru-- also a Russian platform. Odnoklassniki.ru* is a less commonly used media in Russia as it has existed for a long time. Just like *Vkontakte.ru*, *Odnoklassniki.ru* has a Koryo Saram group which is open to anyone interested in the history and culture of the multifaceted ethnic group.

[72] Numeo. Koryoin Assistance Center. Accessed January 9, 2022, http://www.jamir.or.kr/main/main.php.

[73] Israel Ministry of Foreign Affairs, trans. "The Law of Return." The Jewish Agency For Israel. Accessed January 9, 2022, https://archive.jewishagency.org/first-steps/program/5131.

[74] "Law of Return." Wikipedia, January 8, 2022, https://en.wikipedia.org/wiki/Law_of_Return.



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shared identities, and citizenships.[75] Therefore, people essentially have the control over where they feel a sense of nation-ness. However, Anderson in *Imagined Communities* states that "nation-ness is assimilated to skin color, gender, parentage and birth era - all those things one can not help".[76] Anderson's assertion reveals a sobering truth: modern people progressively developed a fixed image of 'nation-ness' or nationalism as rooted in the visible and unchosen factors. If a group of people does not possess all of those natural characteristics, then they may encounter a wall of unacceptance and discrimination even in places where they truly believe they belong: the homelands where their race or place of birth might not be traced, but where their hearts reside.

Koryoin, despite generations away from their physical homelands, retain a strong sense of Korean-ness; that notion is where their hearts are. Yet, the Koreans hold different definitions of Korean-ness, and these conflicting perceptions between Koreans and Koryo Saram seem like magnets of the same pole: essentially the same, but can never unite.

To solve this problem of identity, citizenship, and belonging, Koyro Saram and Koreans first have to pause from incessantly striving for their own goals. In order to reach the same page and the same starting point of understanding, the Koryo Saram and Koreans must focus on untangling the firmly tangled knot of problems that is growing till this day. Reaching the same page means that both parties must have the same general outlook on the issue at hand. To do that, Korea must be more specific in their definitions and policies, and provide more legal protection of the Koryo Saram, perhaps a special visa with provisions like Israel's Law of Return. On the other hand, the Koryo Saram must understand that the Koryo Saram and South Koreans are not the same people anymore, and that they may never receive full citizenship.

Gregory soulfully belted out the words of the Arirang, a traditional folk song that has become the de-facto national anthem and popular even in current-day North Korea. The lyrics express that two star-crossed lovers are separated and distraught, without any real conclusion as to whether they would meet again. Gregory most likely never got to see his family again nor the country he desperately cried out for, but Koryo Saram can be reconciled with their "beloved one,"[77] no matter how she has changed.

[75] Guadeloupe, Francio, and Yvon van der Pijl. "Imagining the Nation in the Classroom: Belonging and Nationness in the Dutch Caribbean."
[76] O'G, Anderson Benedict R. *Imagined Communities: Reflections on the Origin and Spread of Nationalism*. London: Verso, 1991., 147
[77] Arirang roughly translates to "beloved one"

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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460X & Print ISSN: 0975-587X

# Ecological Viability and Cybernetic of Ayllu

By Leonardo Lavanderos & Alejandro Malpartida

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*Keywords:* *ecological viability, ecotomo, chrematistic, ayllu, culture-nature.*

*GJHSS-C Classification:* *DDC Code: 006 LCC Code: Q175*

*Strictly as per the compliance and regulations of:*

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# Ecological Viability and Cybernetic of Ayllu

Leonardo Lavanderos [α] & Alejandro Malpartida [σ]

*Abstract-* **This paper introduces Ecological Viability, a new concept in Ecology. This concept is multidisciplinary and systemic in nature. The Ecotome concept is introduced in order to homologize it with the Ayllu (Quechua Aymara) and design the latter as a cybernetic system. The ultimate goal is to re-establish the Oikos that ecology and economics (exchange value chrematistics) have removed from the culture-nature relationship.**

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## I. Frame

An organization is a type of community that defines its viability and determines the boundaries of the network of relationships or relational field because it is a relational system that recognizes and reproduces the relationships that make it viable, even without considering its origin or purpose. When we talk about borders, we're talking about the relationships that organize that field from its processes of agency (taking it over) and belonging (becoming a part of it), which constitute its territoriality. This implies that the community's complexity as a network of human relations is determined by what the culture recognizes as constitutive of its territoriality. At this point, it is necessary to distinguish two points of view on cultural identity and opposition. accumulation of exchange values.

On the other hand, we use the term opposition whenever culture constructs territoriality as a class: whether culture is different from/the same class as nature (but not a member). The current economy's position, which is strictly chrematistic, leads us to prioritize natural assets not as use-values but as a source of exchange value production. This is what makes the current ecologists a flagrant antinomy, as stated in the preceding paragraph, by considering belonging but valuing oppositely. A "Davosian school of ecology," to use a euphemism. When we talk about "Davosiana," we're talking about the World Economic Forum (WEF), a gathering of top international business and political leaders to discuss the world's most pressing issues, including climate change.

Thus, natural resources are exploited in accordance with the needs of the culture of agency or property, which have been determined a priori and generated politico-administratively. In the first chapter of his Politics, Aristotle distinguishes oikonomia from Oikos, which he defines as "A necessary and natural community, the very basis of existence, and, in the human case, "constituted for daily life," whose members eat the same bread and are warmed by the same fire" (Pol. I,2).

Thus, oikonomia is concerned with determining how to provide oneself with the use-values required for a good life. In contrast, Aristotle defines chrematistics, or "the art of acquisition," in two ways: one as a complement to oikonomia in the sense that it.

Concerning the arguments advanced, both ecologists' and current economists' concepts refer to chrematistic thinking, which is not relational. As a result, they develop classification systems based on a realistic-dualistic view of the world in its most naive form. They ignore the reciprocity of the human-nature/culture-nature relationship, as well as the development of the former in tandem with the latter. They, on the other hand, assign potentialities to the "non-human system" based on the "benefits" it can bring to human culture. Instead of responding to the "needs" freely manifested by the "sovereign consumer," these "benefits" respond to the needs of production and the reproduction of exchange values, which actively shape and reproduce these needs through advertising and merchandising (Galbraith, 1983).

Both of the aforementioned perspectives have political implications because, by dissociating and breaking the culture-nature relationship, they reduce the community's complexity to tradable objects, whether human or natural. In other words, they turn the condition of the community's relational viability into a commodity, making the human being the owner of nature. This is what we call colonization and epistemological extractivism, and it runs counter to all bioethics.

This paper is organized as follows: first, the uniqueness of culture-nature as a relationship is discussed. The Living Well (Suma Qamaa in Aymara, Sumak Kawsay in Quechua) is then explained as a relational culture-nature concept. Following all of these conceptualizations, the concept of Ecological Viability is used to finally propose a relational cybernetic model (Kawsay) of the ecotome such as that of Ayllu, freeing current Ecology from chrematistic concepts.

## II. Bases of the Relational Conception of the Culture-Nature Unit

Cartesianism and the disjunct image of the human world concerning the so-called natural or, rather, in the objectivity of the subject. Objectivity allows the validation of arguments against the referent of experience, which tautologically corroborates the

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objectivity of the subject, which is certainly, a predicate of the object.

In the Eurocentric conception of this world, the relation as philosophy did not take place, for most of the scientific corpus, this is a given world of objects that demand the observer, who elucidates interactions, transactions, and coercions among other forms of action.

The relation as philosophy is intricately connected to the conception of experience as temporality and history. The principle of identity and the descriptions of the inherent character of objects held in science corresponds to a primary conception in the history of knowledge, that is, the substance, essence, and autonomous character of the real. (Malpartida and Lavanderos 2003).

The relational conception is immersed in the experience, in the situation and circumstance, there is no possibility of a historical experience. From this perspective, cognitive decolonization implies recovering concepts that allow such operation in semiotics, the Kawsay concept (Quechua) expresses it as relational and shared vital activity (culture-nature), with a communitarian idea. (Macas, 2010, p 25). Irreversibility arises then as a condition of experience and not only as a reformulation of the classical concepts in thermodynamics such as the non-linear thermo-dynamics of irreversible processes of I. Prigogine. From the relation, irreversibility is translated as the logic of history and this is so because it is the logic of the living, the idea of probability arises then from the irreversible and not the other way around, (Paci, 1954). For this reason, the notion of entropy does not find irreversibility because it is defined in the statistical domain, it is the most probable state and as probability, it is a predicate of the irreversible and not a condition.

In this scheme the irreversible to be such only requires novelty, process, emergence and is at the basis of the conception of systems. If any communication must enter into the relational space of human nature, and as such into the process of experiences and history, then reality emerges from that historical existential situation and is comprehensible and orderly only within that situation. The Sumak Kawsay as a relational concept Culture-Nature summarizes this fullness, communitarian, reciprocal, and solidary. (Tenesaca Caguana, 2013, p. 18).

According to Paci (op. cit.), the vice of traditional (popular) metaphysics is to consider the object itself as the substance of being and to isolate the world of "substance" from the world of "experience", thus reducing experience to the necessary, the timeless and the unique. To leave aside the relation and the emergent character of experience in all decision-making is to believe that scientific arguments are acontextual in their meaning, that the aprocessual and ahistorical is what characterizes the subject of the relationship and that this is the basis for its objective character and argumentative validation.

At this point it is worth asking what ideas we generate, from Eurocentrism, regarding the relationships for a given context, are they immutable images of a demanant world immersed in mechanical and clockwork determinism, or are they the possibilities that are cultivated from the historical understanding of cultural-natural processes?

The answer to these questions is the basis of the process of epistemological decolonization assumes the Judeo-Christian matrix that finds in the unity of the Greek "logos" the condemnation of polytheism and the legitimization of a single, monotheistic thought. The counterpart of the literate citizen is the pagan barbarian, a worshipper of other gods, that is, who lives outside the norms of civilization bases its explanations on the strengthening of the properties of the object to granting exchange value to support the decisions of financial capital.

*a) The Concept of living well, Sumak Kawsay*

Sumak The emergent of the words is Kawsay (Kichwa), or living well; Sumak, which refers to the good, the beautiful, the harmonious, and the perfect; and Kawsay, which means life and existence (Viteri, 2003). Sumak denotes not only a qualifier of goodness, but also, more clearly, fullness. With a communitarian idea that encompasses both spheres, Kawsay expresses the relational and shared vital activity, with other humans and with nature. It would then be "life in plenitude" (Macas, 2010, p 25): a perpetual collective construction with an ancestral foundation that is centered on community life. From the above definitions, and the systemic relational perspective, its translation could be interpreted, since Kichwa is a language whose words do not have a fixed meaning, but the interpretation that is made of it, as a *relational culture-nature vision whose viability is based on the process of agency and belonging as communion*. We wanted to arrive at this definition given that, according to the variety of meanings, Sumak Kawsay has been transformed into concepts, ambivalent, ethereal, and difficult to concretize; convergent or divergent according to the ideological and political use made of them. (Breton et al. 2014), consequently, Sumak Kawsay depends on the current of thought to which it belongs, which have been identified as socialist and statist, indigenist and "Pachamama" or ecologist and post-developmentalist (Breton, op cit.) This places Sumak Kawsay, according to how it is classified within these currents, in a different cultural frame of reference, which leads to contradictions and operational gaps for decision making.

Thus configured, the relationship expresses a character opposed to capitalist chrematisation and the cultural assumptions it entails. Sumak Kawsay is based



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on another rationality, on a relational vision of the world in which life in plenitude is based on the construction of an OIKOS of relations of reciprocity, solidarity, and cooperation. The basis is the relational viability of the culture-nature community.

*b) Sumak allpa and Ecological Viability*

From the Kichwa philosophy, the Sacha Runa Yachai is postulated, which can be defined as what guides them on their "long road to Sumak Allpa". This path is based on three principles: sumak allpa, sumak kawsay, and sumak kawsay riksina. Sumak Allpa is the principle that regulates the culture-nature relationship (...). The Sumak Kawsai orients the way of living of the community based on a relationality of reciprocity and collaboration which is nourished by the culture-nature relationship. The Sacha Kawsai Riksina is the system of knowledge to achieve a full life as a culture-nature relationship. It is the science of Sumak Kawsai, but "there is no Sumak Kawsai without Sumak Allpa" (Viteri, 1992 in Cubillo-Guevara, A., Hidalgo Capitán, A. 2016).

Based on the above, the Sacha Runa Yachai is an alternative conception to the Eurocentric vision of sustainable development since on the one hand, the concept of development does not exist in the Andean cosmovision (Viteri, 2000), and on the other hand, the Eurocentric, Judeo-Christian conception of sustainability is not relational.

It is also important to highlight the differences between production in the West and the Andean world (Sumak Kawsay); it is possible to compare Andean technology with that of the West in three of its physiognomies: To work is, in the West, "to make things, to produce"; in the Andean world it is "to raise life". The causal discourse is the basis for the design and construction of technology in the West, while Andean technology is guided by the culture-nature relationship and the process of life. That causal logic restricts the horizon of Western technology to the material, while the principle of the process of life originates the second dimension in Andean technology: the 'symbolic technology', visible in the rituals of production. This distinctive feature explains the particularity of the Andean technological discourse, based on "the metaphor"; the personification of the relationship between culture, nature, and work objects; the possible variety in the making and the symbolic language, to a relational thought.

*c) The Concept of Relational Viability*

Based on the Relational Theory, elaborated some years ago by authors Malpartida and Lavanderos, it is considered that *a viable system* is one that (...) solves its organizational conservation through a structural change strategy (Malpartida and Lavanderos 2005, Malpartida,1991, Malpartida and Lavanderos, 2000). Understanding as "organization" the whole set of relationships that configure its identity as such, a process in constant creation that implies the maintenance of its condition, its conservation, or its disintegration. We understand that, in this line of thought, what can vary is only the structure of relationships, as long as this supports or allow the organization to be carried out. Following the previous points, we will define the Viable Relational System (VRS) as a configuration of networks of relationships that have achieved a coherent coupling between its *−relational configuration* relational ability− and its *−material energetic system* sustainability−, in such a way that it does not put at risk the relationships that generate and sustain the emergence of its organization. From these definitions, we can homologate the Sacha Runa Yachai with the relational conception of systemic relational viability, the relationship between the Sumak Allpa and the Sumak Kaway would determine the sustainability or the patrimonial management of the material energetic resources to make viable the community network from the knowledge system or Sacha Kawsai Riksina. (Fig. N°1).

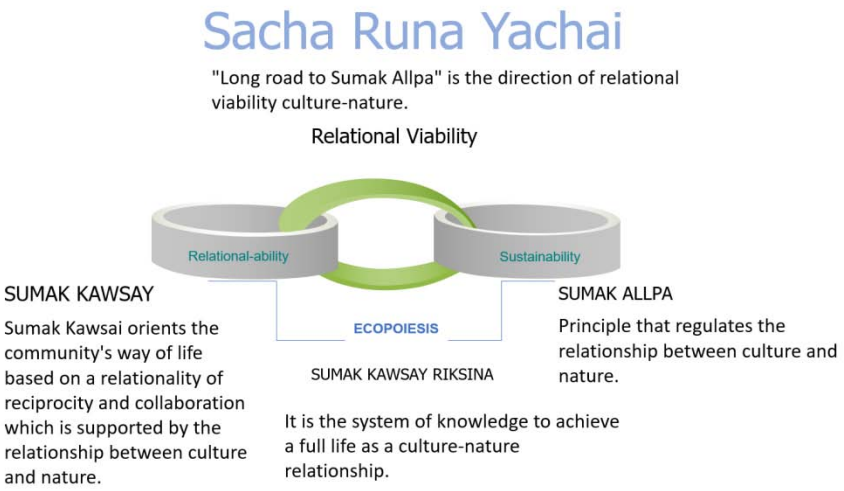


*Figure 1*



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## III. Ecological Viability, from Ecosystem to Ecotome

One of the structural limitations of sustainable development is the imposition of regulations based on concepts that are currently confused or considered synonymous.

Environment and "entorno" must be distinguished as different (entorno is a Spanish word that means that which surrounds and remains). It does not have an English translation; however, it can be understood as what shapes the organism in its surroundings. The first is constituted by all the parameters that an observer distinguishes without considering the organism. Entorno is everything specified by the organism and is expressed by the behaviors emerging from the *organism-entorno* relationship; it is the current expression of this historical process.

While the environment does not refer to the relational unit, the latter is included in the domain of the latter. It has also been said that the entorno comprises historical processes. Thus, we do not speak of the evolution of the individual, the population, or the species, but rather of the evolution of the organism-entorno.

Access to the entorno of any organism, as observers, is not necessarily experienceable. We cannot distinguish the environment of a starfish or a T virus, we only know that these or other organisms discriminate something. In other words, through the relationships generated and from our viewpoint as observers we postulate that they respond to differences. To the extent that we can access the history of relationships, we can say that we are getting to know the organism-entorno system according to the conservation of its organization.

The entorno must be treated from a monistic conception, that is, as the product of a relationship in our case. In complex units, as is the case of the culture-nature relationship, the entorno is expressed through culture. It is culture as an organization of relationships and transformations that operates on a given environment "modeling" it into an *entorno* and recreating the relationships that finally define its identity as culture-entorno.

The generation of information, as part of the process of maintaining the organization of the organism-entorno unit, is directly oriented to the preservation of identity: idem, of group and ipse, of ecoreferentiality (Morin, 1980). This set of relationships, as part of our ontogeny, is expressed through behavior as a relationship. That is, decisions must be conservative of the sumak kaway-sumak allpa organization. On this basis, the organism that destroys its entorno destroys itself (ipse). For the same reason, financial capital, lacking a relational conception, proposes a development that avoids impacts on the community's entorno, that is, on its culture-nature relational system.

In the same way that the duality or dissociation of the organism from its environment cannot be accepted, it is inadmissible to try to explain the development of a society based on "relations that are internal to it" without reference to an entorno that is not only generated by the culture of that society, but at the same time makes the organization of that society possible.

The concept of the ecosystem as introduced by Tansley (1935) and later developed by Lindeman (1941), who only conceived it from a domain of energy exchanges, has derived from its original meaning into different meanings and partial meanings up to the present. For example, the confusion generated between the environmentalist and the ecosystemic point of view (Vallentyne, 1993) or when talking about natural and human ecosystems as different from each other. Moreover, for many ecologists, the idea of an ecosystem, instead of being an integrating concept, has been transformed into an "external object". For example, when in a scientific paper one can read: "The model proposed here derives how under these constraints competitive exclusion can give rise to diversity and neutrality. Furthermore, our model suggests that neutrality may not just be an assumption for mathematical tractability or a null model for understanding, but the general results of an adaptive process in a finite habitat with limited resources, much like the earth." Keymer et al. 2008.

The environmental movement of the last three decades has done nothing more than spoil the relational sense of ecology, transforming the environment into a thing susceptible to be put at a chrematized value, such as a tradable good. The use of utilitarian terminology has even been accepted in this field, such as the idea of ecosystem service, which, although it is said that it has nothing to do with the idea of the transaction for services, brings about the conceptual distortion that we have been pointing out, regarding the basic natural functions to the idea of service. So today we wake up to the fact that water is traded on Wall Street.

In this sense, we require a unity that makes it possible to dissolve the antinomies between social states and natural states, given that the concept of an ecosystem has been insufficient to address this dichotomy.

*Taken as a system, we have pointed out that the ECOTOMO is the set of relationships capable of maintaining the organizational emergence (relational viability) of the complex Culture-nature unit, which at the same time can reorganize and reproduce itself (sustainability) in such a way that it resolves its energetic and informational sustainability along the Spatiotemporal axis. Malpartida and Lavanderos (1995, 2000).*

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According to the above, we will define as *Ecological Viability* the process or set of processes that allow the organizational emergence of the Ecotome. We refer to Ecological by its root Oikos which, as we had mentioned before, is at the base of the definition of Community according to Aristotle (op. cit) however, it improves ostensibly with the Sumak Kawsay since the community is established as culture-nature relations. This forces the Ecologist to rethink the sense of current research, which due to its reductionist character does not include the culture-nature relationship.

*a) The Ayllu ecotome and its relational cybernetics*

Before designing the Ayllu ecotome, it is necessary to make explicit the concepts from which the design will be generated. For this, we will introduce the concept of variety not required (Lavanderos et al. 2019). A key concept in ecological viability has been variety, understood as the number of possible states of a system. Ashby's Law of Required Variety, Ashby, (1956, 1958), states that only variety can absorb variety. However, the above statement is only valid when formulated in the field of interactions, but it is not possible to sustain it when dealing with relationships, as in the case of human organizations. Thus, it is important to establish the difference between interaction and relationship, which will be key in the design of the Ayllu.

Relational viability operates based on the matching strategy between the relational plane and the energetic-material resource plane, Lavanderos and Massey, (2015). Along the same lines, the loss of resources in an organization depends on the introduction of "unrequired variety", i.e., those relationships that generate dissociation and loss of complexity, which bursts into decision making, generating a loss of organization. In this way, we could define the non-required variety as follows: "For a relational system, all forms of non-required variety generation are produced by destroying required variety." This is a fundamental difference with Asby, (Ashby, op. cit).

In the field of human organizations, unrequired variety assumes the form of a law, which can be exemplified as follows: Situated within an organization, connective diversity, which is what allows the exchange of variety, is weakened, or destroyed in its efficiency by introducing delays, impeding or generating resistance to the flow of data necessary to the process of decision and production. We could add, from the point of view of the theory of systems, that summative properties of the elements of the system would be introduced, which would spoil the emergence of the constitutive properties of the organization and, therefore, of the decision-making process related to its reproduction. This occurs every time a unit exchanges unrequired variety, which determines the loss of control of its output variability. As we have discussed above, the Eurocentric developmentalist formula in comparison with the proposals of living well generates a high degree of non-required variety that is almost impossible to control or diminish.

If we think of it from the point of view of a controlled system, in cybernetics we must generate variety in such a way that its design allows regulation and feedback that achieves the minimum required variety. This implies understanding that the correspondence between the generated variety and the minimum required variety does not have to be exact, necessary, or feasible, but rather; a variety with a minimum complexity is required for the regulator of a system. The areas of diversity that interact and need to be regulated correspond to a matching diversity in the system, the attenuation of the variety must be intelligently designed.

*b) The Construction of the Ecotome*

The ecotome, from our relational systemic vision, implies its conception as a network system of relationships, which are structured based on processes around its cosmovision. The basic relational unit is built on the relationship between a network and its reproductive process. All of which is expressed in the form of decision-making. In this way, a network legitimizes the form of its work concerning a process, which allows access to 1) the variety or number of distinguished steps or states; 2) to its variability or gap between observed and expected results; 3) to the connective diversity or relational structures established to carry out the process. Continuing with the above, the Ecotome can be modeled as a holored, which is co-formed from the coupling between the units of the sustainability and sustainability domains, in which the correction of the variety is not generated in the autonomic dynamics, but a spontaneous process of selection of alternatives (epigenesis). The Ecotome has the condition to replicate itself, within a recursive process ofrecalibration (stochastic), according to the strategic objective of the organization, to build subsystems of networks, which contribute to the organization from its operations and/or processes.

To achieve coherence between operation and administration, we need to fix the relationships between the knowledge network (administration) and the processes (operation), which is achieved through the art or culture of the network's work for these processes. This separates us from any conception of sustainable development and allows us to homologate with the relationship between Sumak Kawsay and Sumak Allpa.

With these concepts, the Ecotome can be studied or constructed based on 3 elements that are not generally thought of, these are the processes, the network that carries them out, and the culture or the "how they do it". In a second moment, it is necessary to



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consider how these 3 elements are related, which leads us to the definition of the Ecotome, for this, we have used the following concepts:

1. *Variety:* Number of states or distinctions declared to carry out a process.
2. *Variability:* Observed gap between expected and observed.
3. *Connective Diversity:* Quality of communication with other ecotomic units that are not directly involved in the process.

Accordingly, the process leading to the Ecotome modeling is conceptualized as follows (Fig. No. 2):

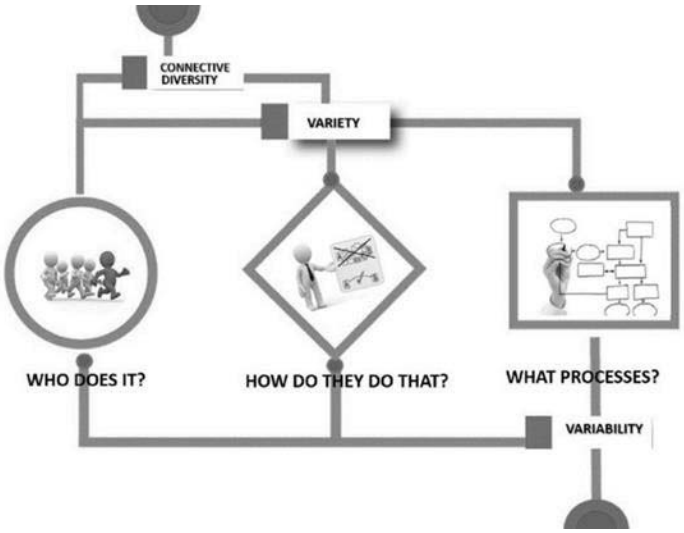


*Fig. N°2:* Ecotome model integrating Culture-Processes.

As indicated above, the model is generated from calibrations that, within the research process, go from the design to its formalization. Formally we would obtain a model like the following (Fig. N°3):

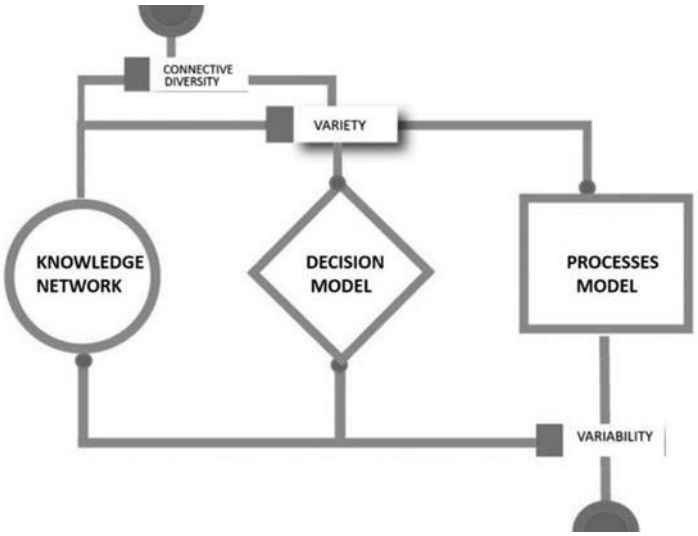


*Fig. N°3:* Ecotome model integrating Culture-Process as networks-decisions-processes.

The ecotome proposes that to reduce the variability of the processes involved in its management, the decision-making model of the knowledge network must be made explicit, to expose the behavior of the variables that account for the output of its process. This allows not only the control of these, but it also evidences the transparency of results for all the actors involved in its reproduction.

The ecotome allows the integration of the whole command area from the co-control of variety and variability. Likewise, the connective quality or diversity allows establishing the degree of collaboration with other areas, to be able to control the variety of the processes that reproduce it.

*c) The Ayllu as Ecotome*

According to the definition of Ecological Viability and the organizational cybernetics of Ecotomo, concerning defining a strategy of reproduction of the community organization as a coupling of sustainability



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(relationships) with sustainability (energetic-material resources) to produce in both contours the variety not required minimum the Ayllu would have the following basic characteristics:

1. A system of territorial organization in networks; as a basis of systematization of the economy to produce use-value; which operates from a logic of configurative culture-rituality and is hierarchically sustained by political authorities.
2. Spatiality as a fabric or territorial relational organization goes from a macro level, which is the control and management of vegetational floors - control of highlands and lowlands - to a complex spiral system that conceives the strategy of coupling between the Samak Kawsay and Samak Allpta.

The figure below represents the cybernetic model as follows (Fig. N°4):

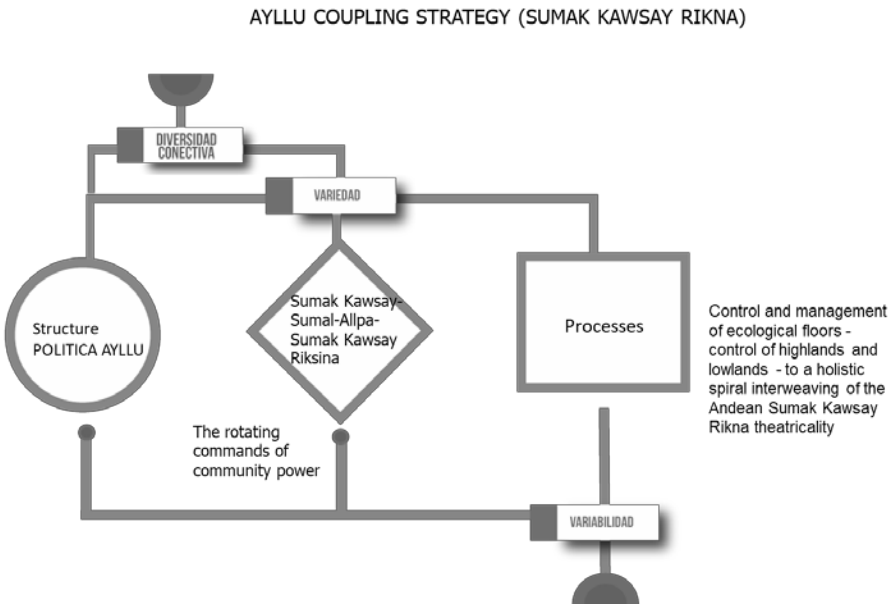


*Fig. N°4:* Model of Ayllu as Ecotome

## IV. In Summary

It is essential to recognize the bases of a syncretism to which we belong, and which is continually denied, without which it is impossible to find viability, which implies at the same time not falling into nostalgic fetishism with "timeless" pretensions, such as the inclination of "cultural studies" to institutionalize the periphery in a fetishistic manner.

As a literal translation, Ayllu means family, but under the indigenous worldview, ayllu refers to a system of relationships beyond the family, that is, the community. "The ayllu is the fundamental basis of indigenous society, by which no positive activity will take place without the participation of the ayllukuna" (Calapucha, 2012, p46). In this sense, ecological viability makes the reproduction of the Ayllu which is expressed as "collective responsibility to ensure the welfare of the community and, therefore, family and individual welfare" (Kowii, 2009). Ecological viability will be linked to their Sacha Runa Yachai, which determines and sustains the family economy.

The Ayllu, from a political and chrematistic point of view, is a regime of land appropriation based on the simultaneity of common property and private possession, a generalized regime in the economic organization of the Inca Empire (Choque 2011). The individual (jaqi) in the Ayllu cannot own land; the land does not belong to him but to the Ayllu, which implies that he cannot accumulate exchange value by selling the land. Hence the impossibility of dividing the territory of the Ayllu into private properties and alienating it. But the individual can become a private possessor by belonging to the Ayllu, which leads to the production of use-value. It is from this community configuration that the individual must position himself in the art of economy and it is in this position where Non-Required Variety is produced, which, according to our relational vision, would be minimal given that it does not produce accumulation of exchange value since it would attempt against the Sacha Runa Yachai.

The Ayllu as Ecotomo is sustained as a condition in a heterarchical structure, which emerges as organized from at least four processes: *cohesion, coordination, communication, and conduction.* The heterarchy proposed here is one in which the members do not think of deciding one over the other, but of interacting. This form of participation can generate multiple ideas, advice, and help, so that the whole group functions correctly, and has the greatest freedom of



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action. Heterarchies are networks, often hierarchical, interconnected, and overlapping with individual components that belong and act simultaneously at multiple levels and with a dynamic that allows the governance and emergence of this whole set of interactions, which is what makes up the whole system.

The Ecosystem and its concepts detached from the culture-nature relational conception must obligatorily migrate to a viable relational system, whose bases are relations of cooperation and reciprocity based on heterarchical structures for finite material energetic resources. This is the basis of the ecotome that forces to return to the economy to reduce the production of the Unrequired Variety resulting from the chrematistic vision of the world. In conclusion, the ecotome finds its niche in the Ayllu as a relational conception, this allows changes and transformations from a cosmovision in which the territory of the community itself or Marka Uraqi, with the living well or Sumak Kaway; the sacralized territory or Pacha Uraqi, with the concept Sumak Allpta, fundamental concepts for a decolonized Science.

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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460X & Print ISSN: 0975-587X

# Gendered Impression of Water Scarcity: The Impact of Water Scarcity on Women's Lives from Gender Perspectives

By Zarin Yesmin Chaity
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*Abstract-* This paper intends to examine the water crisis issue from the perspective of gender. In order to accomplish this goal, the article has first discussed a few challenges that are unique to women and girls as a result of their gender position in society. After that, I discussed the reasons why gender should be addressed in relation to water issues. Secondary data were used for this research which was then followed by qualitative analysis.

The findings of this study indicate that women are more susceptible to water-borne and water-related diseases and they also experience severe pain in various parts of the body as a result of manually carrying heavy weights of water. Moreover, they are exposed to problems and diseases related to sanitation and hygiene and experience difficulties with reproductive health. The study also explored that they become victims of sexual harassment, rape, and other forms of violence while collecting water.

*Keywords: gender; water scarcity; gender division of labour; gender inclusive water policy.*

*GJHSS-C Classification: DDC Code: 333.91 LCC Code: HD1691*

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## I. Introduction

The lack of available water presents people with a myriad of hurdles and difficulties (Rahman et al. 2017). However, women confront a number of challenges that are unique to them as a result of the gender roles that are traditionally assigned to them (Karim et al. 2012; Sigenu 2006). Because of the gendered roles that they traditionally play in the home, women have strong ties to water. As a result, they are more likely to be negatively impacted if there is a disturbance or turbulence in the water quality and quantity in a particular area. A lack of available water has repercussions on the lives of women and has an effect on their physical and reproductive health, as well as their social life and sense of safety (Ngomuo & Msoka 2018).

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Women are closely connected to water irrespective of all societies because they are responsible for the collection, preservation, maintenance, and management of water sources, in addition to the use of water in the day-to-day activities of their households (Irura 2008; Sigenu 2006). Women collect water to be used for drinking, washing, taking regular baths, sanitation, and any other reason the family may need. There is a need for water from every member of the family, but there is only one person who can gather and organize it for the family's needs: the women (Ngomuo & Msoka 2018). In localities where there are insufficient supplies of potable water, it is necessary for women to travel great distances in order to get their water supply, which presents them with a number of challenges (Karim et al. 2012). Therefore, any issues that are associated with water are more likely to affect women than males in the household (Baguma et al. 2013; Caruso 2016). Even though everyone in society is impacted by water shortage (Rahman et al. 2017), women face an extra obstacle and are affected differently by this issue owing to the suppression of their gender roles in comparison to males in society (Lewis & Writer n.d.). This is a problem that eventually affects everyone in society.

This research will concentrate on the unique water-related challenges that women experience while collecting water in areas where there are few or no accessible sources of clean water. After that, there will be a discussion on the significance of incorporating a gender perspective into initiatives relating to water in order to improve the current situation for women. To do so, the study explored the responses to the following questions: *What challenges do women experience as a result of limited access to water and the need to collect water? How exactly does the gendered division of labour make life more difficult for women? Why should gender be considered when making decisions on water and planning projects?*

### a) Rationale of the study

Most studies on water scarcity commonly mention that women and girls are responsible for household water collection (Geere & Cortobius 2017; Sigenu 2006), but we rarely ask the questions- what are the gender-differentiated impacts of this responsibility



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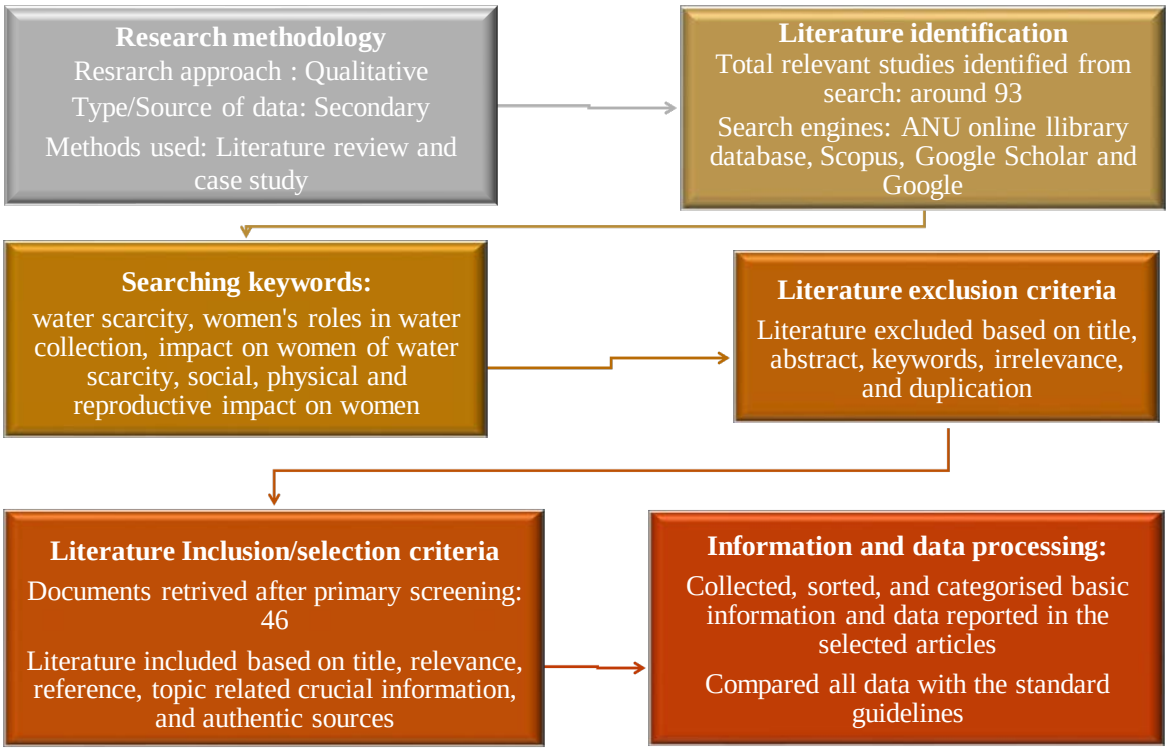
and why "women" are primarily responsible for household water collection, rather than men. The answer lies in the gender division of labour in our society (Baguma et al. 2013), which divides indoor non-productive work into women's work and public productive work into men's work, that is called the public-private dichotomy. This makes the gendered division of labour seem to be a natural order while in reality, it is a socially manufactured phenomenon. As a result, all of the tasks associated with running a family are delegated to women without any acknowledgement or questioning from society (Baguma et al. 2013; Karim et al. 2012). Therefore, this research has focused to explore these commonly unasked questions. Exploring these questions is necessary to contribute to the knowledge level by highlighting the gendered experiences of women due to water scarcity and the necessity of developing gender-inclusive water policies and interventions.

*b) Limitations of the study*

This research was carried out in July and August of 2020, during the COVID-19 epidemic, when there were restrictions placed on the mobility of people. As a consequence of this, the data for the research came from secondary sources. Primary data may have provided a lot of additional dimensions; however, owing to the challenging circumstances and time constraints that were present at the time, this was not feasible. In terms of the potential future scope of the study, this research may be carried out on a more extensive scale in order to collect further empirical data. Researchers might conduct this study using primary data on a wider scale in order to more broadly generalize the results and add empirical evidence.

## II. Methodology

This research is underpinned by feminist research methodology. Feminist methodology reveals the questions from the perspective of women's experiences. It also uses women's perspectives as a significant indicator of the reality against which hypotheses are tested (Harding 1987). This study focused on feminist epistemology because it was primarily concerned with women and their differing experiences and perceptions from those of men. It has tried to reveal women's different reality because of water scarcity and the responsibility to collect water, which men do not experience ever. This research is qualitative research based on secondary data. The data was collected in 2020 while COVID-19 restrictions were ongoing. Therefore, fieldwork wasn't conducted to collect primary data. Secondary data has been collected from online academic books, research articles, government and non-government reports, and print and electronic media reports. These information sources were accessed from Google Scholar, Scopus, Google, and the Australian National University (ANU) library database. The secondary data was searched and narrowed down through specific keywords. Critical literature review and case study methods are applied to investigate the research questions.




**This flow chart is developed by the researcher*

*Figure 2:* Research methodology and data processing flowchart

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## III. Findings and Analysis

- Water scarcity and water-related diseases

Women do not drink the required quantity of water that a human being should drink consistently in order to maintain their health since there is a shortage of water and a lack of understanding. Women are more likely to miss drinking water in order to save water or, in certain regions, in order to avoid going to the toilet because of sanitation concerns (Ngomuo & Msoka 2018). Both of these behaviours put them at a greater risk for a number of illnesses, including those that are caused by inadequate water intake. Because of this, individuals also suffer from a wide variety of diseases that are caused by a deficiency of water in the body. Some examples of these disorders include infections of the kidneys and urine, amongst others. Lack of access to safe water often causes diarrheal diseases (Abedin et al. 2019). This is particularly true of children and women. Consuming water from any source that might potentially be contaminated poses serious health risks (Abedin et al. 2019). The health of families and the economy of society are both negatively impacted as a result of these disorders (Barech & Ainuddin 2019). If women and children are often affected by these illnesses, then they are more likely to become weak, malnourished, and susceptible, and they are unable to engage in other forms of productive labour (Ngomuo & Msoka 2018). Even if they are unwell, women are not allowed to take time off from their obligations in the home; instead, they are expected to do their tasks even if they are incapacitated. In addition to this, women are the ones who take care of ill children, which is an additional obligation that falls on their shoulders. In a larger context, the expense of one's time, as well as medical care, has economic implications (Barech & Ainuddin 2019).

- Physical problems

Women endure various forms of physical difficulties as a consequence of carrying a large weight on their heads or waists for extended periods of time in order to gather water from a great distance (Barech & Ainuddin 2019; Pahwaringira et. al 2017). Sometimes, in order to satisfy the need for water inside their households, women are required to do the task of water collecting many times each day. As a result, carrying excessive amounts of water might result in a wide variety of long-term and short-term diseases and discomforts to the body. The women who are responsible for collecting water often complain of experiencing discomfort in their neck, spine, waist, back, and spine-related issues, as well as headaches. According to research carried out by Geere, who is both a lecturer at the Norwich Medical School at the University of East Anglia and a physiotherapist, 69% of the people who participated in the study had spinal pain, and 38% of women have back pain (Geere, Hunter & Jagals 2010).

These strenuous tasks, which require women to move heavy objects and carry water many times a day, leave them feeling fatigued (Barech & Ainuddin 2019; Otufale & Coster 2012). In addition to the women who reported experiencing physical discomfort, some women indicated that even if they haven't noticed any medical concerns, they nevertheless feel exhausted when engaging in these activities. Because this is one of the household chores for women among dozens of other household chores (Hallett 2016; Otufale & Coster 2012). Hallett brought up Ben Crow's viewpoint on the amount of time women spend working, which is that women often have less time to relax and sleep in order to do all of their tasks (household responsibilities and others). They have to spend a significant amount of time gathering and storing water, which is time that they might have spent doing other tasks or relaxing instead.

Some research has referred to cases of women's health being permanently damaged as a result of carrying water (Barech & Ainuddin 2019). These cases include chronic fatigue, spinal and pelvic deformities, a threat to reproductive health and an impact on that health, such as high-risk pregnancies and an increased incidence of abortions (Abedin et al. 2019; Otufale & Coster 2012; SIDA 1997).

- Concerns Relating to Hygiene and Sanitation

Since there is not enough water available, women are unable to properly maintain sanitary facilities. The challenges that women face with regard to water, sanitation, and hygiene are inextricably linked (Ngomuo & Msoka 2018). A whole circle of women's vulnerability is being created as a result of one issue triggering a problem for another issue. In places where there is a shortage of water and sanitation facilities, women may consume less water and food in order to reduce the number of times they need to defecate or to keep themselves under control until nightfall in order to gain privacy when defecating in the open. This allows them to conserve water and also helps them address the issue of a lack of adequate sanitation systems in their households or in the surrounding area (Barech & Ainuddin 2019; World vision n.d.)

While women and girls do not have access to sufficient water for personal hygiene during menstruation, pregnancy, or other times when their bodies are particularly vulnerable, then they face an increased risk of infection, bacterial diseases, and sexually transmitted diseases, in addition to other medical issues (Gahungere 2008; Ngomuo & Msoka 2018). The health and cleanliness practices of mothers have a direct bearing on the general well-being of their families (Ngomuo & Msoka 2018). If mothers have poor lifestyle choices that put their health at risk and cause their children to develop chronic illnesses. Moreover,



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such behaviours will be passed on to the next generation and continue the cycle.

- Violence and insecurity

Water scarcity and lack of water sources in close proximity increase the risk of violence and insecurities among women (Karim et al. 2012). Having to travel a long distance or lonely path to get water sources puts women in a much more vulnerable position. Women who go long distances alone to gather water often be subjected to eve-teasing, marital violence or other forms of sexual harassment (Karim et al. 2012; Ngomuo & Msoka 2018). Karim et al. (2014) shared that, women who have to collect water from a distant place or well during the lean period, are subject to domestic violence because they sometimes fail to fulfil their other household chores in due time. The report by Médecins Sans Frontières titled "The Crushing Burden of Rape-Sexual Violence in Darfur" which was published in 2005 mentioned that in Darfur, 82% of almost 500 women were treated for rape attacks while they were doing household work such as water fetching or firewood collection just within five months. Rape, sexual attacks, and eve-teasing occur while the women get out to collect water from a distant water source and go alone (Ngomuo & Msoka 2018). Even though they are aware that they run the danger of being subjected to sexual assault or rape, women in certain societies are expected to go out for defecation in groups before dawn and after sunset, when it is still dark outside and there is no access to clean water or sanitation facilities (Sweetman & Medland 2017).

- Gender division of labour

The majority of the responsibility for obtaining water for domestic tasks and storing it for later use falls on women (Baguma et al. 2013). However, despite the fact that men also need water for their day-to-day activities, they are seldom held accountable for the water collecting process (Musa 2008). Women are the only ones who collect water, but males perform the role of builder in-home water management, which includes activities like digging wells and constructing tanks, among other things (Rahman et al. 2017). Additionally, men are in charge of making choices on water management in a family. In addition, men are in charge of the water outdoors, which may be used for irrigation or any other reason (Karim et al. 2012). As a result of the gender division of labour, women are given unpaid job that lacks respect or authority (Baguma et al. 2013). Hence, the task of taking care of the family falls completely on women, despite the fact that there is no biological relationship between completing these works and being a woman. On the other hand, males are often tasked with public works, which are tasks that are compensated for and acknowledged as having economic worth. As a result, males have more economic power than women do in the majority of nations.

- An increase in workload

Research conducted in 24 Sub-Saharan African countries suggests that women are the main water collectors who spend on average more than 30 minutes daily collecting water, and the involvement of women in water management ranges from 46% to 90% (Graham et. al 2016; Otufale & Coster 2012). As our culture is male-dominated, the unpaid job of home chores has traditionally been assigned to women. This work is done without any appreciation, and it is regarded as rather common from a sociological standpoint. In most cases, males do not contribute to the upkeep of the family, which means that women are exclusively responsible for all aspects of domestic life (Karim et al. 2012; SOAWR 2008). Because women need water throughout the day for activities like cooking, washing, cleaning, maintaining personal and family hygiene, and so on, the fact that they do not get sufficient water in comparison to their demand impedes their normal job (Ngomuo & Msoka 2018; Tshabatau 2021). Safe water supplies in the home, such as tap water, tube wells, ponds, or any other kind of processed water source, may dramatically lessen the amount of work pressure that women are under and allow them more breathing room within their otherwise packed daily schedules. But if they have to gather water from a faraway area by walking and standing in line for a significant amount of time, then this increases the amount of labour that women have to do and the amount of time they spend working (Karim et al. 2012; Tshabatau 2021). Women spend more than hours every day tending to meet the water requirements of their families and walk an average of 10 km daily to collect water (Tshabatau 2021). Women in some regions of Africa devote a significant portion of their days—up to eight hours—to the task of gathering water, which is a significant proportion of their time (Facts about women and water n.d.; Tshabatau 2021). Where there is a lack of access to water, this is an extra task that falls on the shoulders of women, which results in an increase in both their working hours and their workload (Karim et al. 2012).

- Opportunity costs

Women and girls bear a disproportionate share of the opportunity costs associated with water shortages (Karim et al. 2012). These opportunity costs include lower levels of education and employment, worse health, and lower levels of national productivity. Both the women's time and the energy they put into collecting and processing water may have been put to better use elsewhere (Tshabatau 2021). Girls who are tasked with the responsibility of water collection often sneak out of class to do their duties. According to the findings of one research, many young women in South Asia and Africa



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choose not to attend a school or give up their education altogether so that they may spend more time helping their moms gather water (Gahungere 2008). If we were to translate the amount of time that women spend on water collection and management into monetary worth, we would see that we are missing out on a significant amount of value that might be contributing to our national productivity and revenue (Tshabatau 2021). It is estimated that women in India spend 150 million working days each year to collect water, which is equivalent to 10 billion rupees per year that India loses from its national revenue (NCW n.d.). It was said in Drop4Drop (2016) that the time that women and girls in sub-Saharan African countries spend on water collecting is equivalent to forty billion hours, which is time that they might have utilized for other things in their life.

## IV. Why Gender should be Included in Water Policies?

The problems that have been discussed here are not new nor unheard of. On the subject of water shortage difficulties, different types of studies have been conducted, and numerous conversations have taken place; nonetheless, this problem has not yet been solved. In spite of the tremendous efforts made by local, national, and international development organizations, the pace of improvement is quite sluggish. The most important aspect of this topic that I wanted to highlight is the fact that a lack of water has a gendered aspect to it, and if we want to find a long-term solution, we need to engage the group "women," who are often the ones that are connected and impacted by water issues. However, in the majority of instances, their perspectives are not heard. When it comes to issues concerning taking control of, power exercise or the administration of water resources, the majority of the time it is males who take the initiative and oversee the involvement (Rahman et al. 2017).

For instance, based on the researcher's personal experience of living in a southern coastal area of Bangladesh known as Koyra in the Khulna division, where there are very few sources of safe drinking water due to the high salinity in the water, she found that there is a high gender disparity between water collectors and water decision-making power holders. This was one of the things that stood out to her during her time there. In those areas, drinkable water sources are being provided by a number of national and international organizations, including World Vision, Plan Bangladesh, Shushilan, and Podokkhep (Abedin et al. 2014). These water sources are managed by local people through water management committees (Rahman et al. 2017).

However, the majority of the members of the water management committee were males. There were a few female members there who were either organizational members or local representatives. Women who were directly linked with water collection and management were not members of any committee that is responsible for management or decision-making about water sources. As we've seen in the discussion, in most societies, the task of gathering water falls under the purview of the female population. The primary reason for this is the way our society constructs gender roles. In a society that is dominated by men, the gender division of labour typically entails women performing unpaid work in the private sector and men performing paid work in the public sector. Men are never taught that the task of taking care of the family is a joint obligation in which they should both engage equally (Baguma et al. 2013). In addition, under a patriarchal culture, women are seen as weak, which leads males to believe that women are helpless and subject to violence or domination.

Therefore, in order to lessen the severity of these difficulties and reduce the gender gap in water management, we need to prioritize gender equality concerns in any intervention involving water (Baguma et al. 2013); failing to do so would prevent us from reaching long-term resolutions. It is highly crucial to listen to the voices of women since they can represent true circumstances from their own empirical viewpoint. To acquire empirical knowledge about the issue and identify solutions that are both effective and sustainable, all interventions relating to water should consider gender to be an important element in the design of the intervention and pay special attention to the opinions of women, who are most involved with water.

## V. Concluding Remarks

Issues relating to the collection and management of water are intricately connected to gender problems. This article discussed several concerns that are caused by a lack of water that is only encountered by women and girls. Women have to collect water to meet the water demand of the whole household. They walk extra miles and spend a substantial number of hours collecting water which affects several aspects of their lives. Women suffer from physical pain, discomforts, illness and waterborne diseases due to water scarcity and lack of access to safe water. They lack proper hygiene and sanitation facilities which hamper their reproductive health as well as their family health. They also become victims of sexual harassment and violence while collecting and managing water. Moreover, women pay high opportunity costs in their lives to fulfilling the responsibility of water collection. Young girls and women get deprived of education, employment opportunities, health facilities, and low or no amount of rest time in their life. This study discussed that gender division of labour is one of the crucial reasons for this disparity of responsibility for water collection and management in society. Therefore,



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we should emphasise on gender perspective to improve the situation.

Finally, this study discussed the importance of incorporating a gender perspective into all water policies and projects so that any water-related interventions benefit all inhabitants of the society irrespective of their gender and ensure their access to safe water. To do so, a few suggestions were made here. These include addressing gender perspective in water policy, technology, and distribution; increasing female participation in water management committees and projects; ensuring gender-sensitive policymaking and women's active participation in policymaking; raising awareness of gender issues among community members; and, most importantly, redefining men's roles in household work to achieve a more equitable distribution of labour.

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Global Journal of human-social science: C
Sociology & Culture
Volume 22 Issue 5 Version 1.0 Year 2022
Type: Double Blind Peer Reviewed International Research Journal
Publisher: Global Journals
Online ISSN: 2249-460X & Print ISSN: 0975-587X

# The Ghetto Revolution: Historical Memory in Rap

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*Abstract-* This article seeks to connect the categories of Historical Memory and Colombian Rap, carrying out an analysis from the testimonial voice of the authors of Rap lyrics that during the decades of the 80's, 90's, 2000 and 2010 have portrayed victimizing acts towards the Colombian population in the framework of the armed conflict, concluding in the recent social mobilizations of the year 2021, in which the youth and the Hip Hop movement played a fundamental role in the transformation of imaginaries and construction of participatory processes from the bases culture in the different regions of the country.

The article connects news events, which are referenced through press releases, titles of musical productions, rap lyrics, compilations and interviews with the people who led these processes, inquiring about the impact of music on the understanding of the social situation. of the country and of phenomena such as: social cleansing, drug cartels in Colombia, abuse of authority by the military forces, compulsory military service and protest processes such as conscientious objection and social mobilization.

*Palabras clave: hip hop, rap colombiano, memoria histórica, música, testimonio.*

*GJHSS-C Classification: DDC Code: 792 LCC Code: ML50.M6736*

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# The Ghetto Revolution: Historical Memory in Rap

## La Revolución del Guetto: Memoria Histórica en el Rap

Diana Avella

*Resumen-* El presente artículo busca conectar las categorías de Memoria histórica y Rap Colombiano, realizando un análisis desde la voz testimonial de los autores de letras de Rap que durante las décadas de los años 80´s, 90´s, 2000 y 2010 han retratado hechos victimizantes hacia la población colombiana en el marco del conflicto armado, concluyendo en las recientes movilizaciones sociales del año 2021, en las cuales la juventud y el movimiento Hip Hop jugaron un papel fundamental en la transformación de imaginarios y construcción de procesos participativos desde las bases culturales en las diferentes regiones del país.

El articulo conecta hechos noticiosos, que se referencian a través de notas de prensa, títulos de producciones musicales, letras de rap, compilados y entrevistas a las personas que lideraron éstos procesos, indagando sobre el impacto de la música en la comprensión de la situación social del país y de fenómenos como: La limpieza social, los carteles del narcotráfico en Colombia, el abuso de autoridad por parte de las fuerzas militares, el servicio militar obligatorio y procesos reivindicativos como la objeción de conciencia y la movilización social.

*Abstract-* This article seeks to connect the categories of Historical Memory and Colombian Rap, carrying out an analysis from the testimonial voice of the authors of Rap lyrics that during the decades of the 80's, 90's, 2000 and 2010 have portrayed victimizing acts towards the Colombian population in the framework of the armed conflict, concluding in the recent social mobilizations of the year 2021, in which the youth and the Hip Hop movement played a fundamental role in the transformation of imaginaries and construction of participatory processes from the bases culture in the different regions of the country.

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*Palabras clave: hip hop, rap colombiano, memoria histórica, música, testimonio.*

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## Introduction

El Hip Hop en Colombia comparte el trasfondo social, político y juvenil del continente, acopla sus contenidos a las dinámicas sociales y territoriales que inspiran a los artistas que lo conforman, "Posiblemente llegó a Colombia hacia 1983-84 por distintas vías, una de ellas, en las minitecas, donde sonaba lo último producido en Nueva York. Otra vía fue el cine, gracias a una serie de películas que se volvieron paradigmáticas" como lo indica (Ruiz, 2010, p. 37), por lo tanto mantiene religiosamente características como su estructura relacionada a los 4 elementos, los principios dictados por KRS One y hasta la estética del Hip Hop Estadounidense, con la particularidad en la actualidad de adaptarse a contextos rurales e identidades étnicas y sus lenguas, rompiendo la categorización de "música urbana" definición en el cual ha sido encajado el Rap por las industrias culturales a nivel mundial.

Éstas grandes industrias culturales, e inclusive los mismos medios de comunicación masivos nacionales, durante muchos años mantuvieron al margen las letras del rap colombiano de sus audiencias, al igual que su estética, su baile y su grafica. Acercarse al Hip Hop para muchos jóvenes, fue un símbolo de rebeldía y para otros tantos, la única opción distinta a la violencia, el microtráfico, la delincuencia y la pobreza. Por coincidencia, o por conexión, el Rap en Colombia empezó a echar raíces en los sectores periféricos de la ciudad, sin omitir que también en los "Nortes"[1] de las ciudades, o en los

[1] Para ampliar el concepto de los nortes de las ciudades, Aguilar (2002), realiza una descripción territorial de cómo la realidad de las arquitecturas y disposiciones en la planeación de las ciudades en América latina, extiende la segregación territorial a determinados sectores sociales. Los nortes, en este sentido se relacionan con los espacios geográfico de mayor desarrollo económico e industrial, Aguilar lo describe de la siguiente manera:

> Lo anterior ha dado lugar a que las nuevas y mayores expresiones metropolitanas en el territorio sean más frecuentes en ciertas localizaciones que en otras. Esta realidad señala la necesidad de identificar aquellos lugares de *alto atractivo* desde diversos puntos de vista (habitacional, de equipamiento, industrial etc.) dentro de la periferia metropolitana para explicar los núcleos detonantes de las nuevas configuraciones espaciales; en este sentido, podemos mencionar la consolidación de corredores industriales, grandes desarrollos corporativos, construcción de aeropuertos o extensos desarrollos inmobiliarios residenciales, que van marcando la pauta para la formación de periferias expandidas. Aunque



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sectores de alto estrato tuvo una gran acogida, porque no solamente fueron las voces de los habitantes de los territorios más golpeados por la miseria, que se levantaron a ritmo de Rap, el Break Dance, el Graffiti y el DJ, en el Hip Hop se conectaron las cotidianidades, las luchas y los dolores de los jóvenes que habitaban estos sectores.

Así, a través de las letras, la danza y la estética, el Hip Hop en Colombia, se fue conectando con las historias políticas y sociales. Desde el Rap Particularmente, contamos con ejemplos específicos de cómo la escritura se convirtió en memoria histórica. El Hip Hop se conectó con jóvenes de territorios específicos en su llegada. La conexión entre el territorio colombiano, la particularidad de la vida de los jóvenes que lo acogieron como su banda sonora y la identidad que ya traía desde EE.UU y las historias de guerra en la ciudad, pandillas, injusticia social y discriminación, también hicieron mella en las creaciones musicales en Colombia, en la conexión con la danza, el graffiti y el Break Dance. Vamos a conocer algunos ejemplos de canciones de Rap que conectan con cronologías de país.

1. *Los años 90: Las letras frontales del Rap ante la limpieza social, el reclutamiento militar y el narcotráfico.*

El presente apartado, busca conectar la cronología de los hechos de importancia nacional, con las producciones musicales desarrolladas en la década de los 90, y que corresponden a creaciones de Rap, las cuales fueron narrando los hechos victimizantes de la desaparición forzada, el fenómeno de la limpieza social, en el contexto donde el narcotráfico y el reclutamiento militar vulneraban los derechos de los jóvenes en el país.

Durante los años 80, la agrupación musical La Etnnia, que anteriormente se conoció como La Etnnia Rasta y que ésta precedida por el Break Dance como su primera práctica artística, nace en las cruces, liderada por los hermanos de apellido Pimienta, habitantes del barrio Las Cruces en el Centro Oriente de Bogotá, procedentes de una familia conectada con la historia de la migración y el desplazamiento forzado. En el año 1994, la Etnnia presentó su primera producción musical, esta serie de canciones de Rap fue titulada: "El Ataque del Metano", haciendo alusión al gas que se produce posterior al proceso de putrefacción de la materia en descomposición, queriendo denunciar y evidenciar el estado de la sociedad colombiana en ese momento. En este disco, que por nombre nos conecta a una interpretación critica, de finales de los años 80´s y principios de los 90´s, espacio de tiempo en el cual se vivieron acontecimientos históricos como la toma del Palacio de Justicia, el asesinato de Jaime Pardo Leal, Luis Carlos Galán y se sume el país en la violencia del narcotráfico, el paramilitarismo y las nacientes Convivir. En este contexto, la Etnnia presenta este disco, que incluye la canción: Pasaporte Sello Morgue, de la cual presentamos un fragmento correspondiente de las primeras estrofas de la misma e introducción a la narrativa ligada a la violencia policial y limpieza social.

> Mi orgullo se veía muy ofendido
>
> Al ver cómo este me tenía muy herido
>
> Dijimos: "somos humanos y tenemos nuestros derechos" Ustedes son tan solo unos pobres desechos
>
> Íbamos caminando ya para la estación
>
> Que si siguen mariqueando les vamos a dar la lección
>
> Esta es nuestra ley, la puta madre marginal
>
> A eso se le llama la "limpieza social"
>
> (La Etnnia, 1995, 0m53s)

La letra de esta pieza musical, narra la situación de un grupo de jóvenes que caminando por las calles de la ciudad se encuentran con una patrulla de la policía; quienes les exigen sus documentos de manera violenta. La policía indica que conocían previamente a los jóvenes a los cuales les solicitan el documento de identidad. El cantante manifiesta la vulneración por parte de la policía, el abuso de autoridad y la práctica de agresiones físicas como graves vulneraciones a los Derechos Humanos de jóvenes de sectores populares. Al final la canción indica "Para la sociedad no somos más que un lio", haciendo alusión a la complicidad desde el silencio de personas que consideraban apropiado el trato violento de la fuerza policial a los jóvenes. Así también lo indica Perea (2016) en su texto: Limpieza social, una violencia mal nombrada, en el cual presenta tres esferas en la configuración de este fenómeno.

> En primer lugar, desde la fundación de los barrios, la presencia histórica del exterminio social como una pieza más de la "colonización" urbana y, en consecuencia, ubicada desde ese entonces en el lugar de elemento de la conciencia de la seguridad local. En segundo término, el papel que desempeña la práctica del aniquilamiento en el espectro de estrategias de la totalidad de agentes que pretenden ganar legitimidad en lo local urbano, como lo ponen en evidencia las bandas delincuenciales y los grupos paramilitares. Finalmente, en tercer lugar, el papel activo de la Policía en el emprendimiento y ejecución de operaciones, el lado opuesto del silencio del Estado p. 155.

En este orden de Ideas, Perea (2016) contextualiza el fenómeno de la mal nombrada limpieza social, en relación a actores que amplían la perspectiva estatal, la sociedad con sus prácticas de discriminación y segregación social, desde imaginarios erróneos de seguridad ciudadana, los actores al margen de la ley y la policía. La relación: Estado, barrio, seguridad e

también es imprescindible identificar los *territorios rezagados* y en cierto sentido pobres, que representan el polo opuesto y que ponen en evidencia las enormes desigualdades intrametropolitanas.



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impunidad, son categorías ampliamente abordadas desde el Rap en la década de los 90. Un panorama amplio respecto a la impunidad estatal, lo realizó La Etnnia, la agrupación de Rap Colombiano, fue tejiendo en la triada: El ataque del metano, 1995, Malicia Indígena 1997, Criminología 1999, álbumes de Rap que hicieron una documentación histórica del momento actual del país, y la particular relación del estado en persecuciones, limpieza social, ejecuciones extrajudiciales, en el artículo: La Etnnia el Legendario Himno del Hip Hop Latino, se plantea un análisis acerca de los tejidos narrativos en sintonía de memoria histórica:

> En noviembre de 1997, el diario El Tiempo titulaba "DAS y Convivir harán inteligencia conjunta". El paramilitarismo, como una fuerza armada avalada como un secreto a voces por el Estado, traspasaba los límites de la guerra en los campos colombianos y llegaba a las ciudades, con los métodos de tortura propios de estas fuerzas armadas ilegales. El álbum Criminología en sus catorce tracks presenta el contexto nacional de finales de los años noventa, canciones como "La bolsa", "El intocable" o "Crimen y castigo" narran el análisis de contexto capturado de los relatos vividos por los callejones del centro oriente. Desaparición forzada, tortura, negocios ilegales, narcotráfico, explotación infantil, migración son las categorías que van tejiendo el desarrollo de esta larga duración, para llegar a los últimos tracks, "Génesis", "La Etnnia" y "Emigrante latino", que sin duda eran un anticipo de la inminente internacionalización de La Etnnia, que ya había conquistado América Latina y prometía llegar al mundo entero. (p.231)

El Rap en Colombia, develaba las historias cotidianas desde un análisis político de amplio espectro. Gotas de Rap por su parte, a mediados de los 90, presenta su sencillo: Contra el Muro. También procedente de las cruces, en Bogotá, empieza a proponer narrativas contestatarias con las canciones "De negro a negro" y "Machismo con M de Mujer", pero en 1997 en el larga duración "Revolución", nos comparte la canción Militares, una narrativa en contra del servicio Militar Obligatorio, reveladoras rimas conectadas con la realidad social del año 1996. Para ampliar éste análisis de carácter cronológico, es relevante tener en cuenta el mandato popular por la necesidad de movilizarse ante el reclutamiento y la guerra. En los años 90, diversas movilizaciones sociales frente al servicio militar obligatorio se tomaron la opinión pública y propiciaron el desarrollo de procesos organizativos en torno a que la guerra no fuera una alternativa para los jóvenes de los sectores vulnerables del país, así como lo expresa Sánchez (2009), en el Periódico Desde Abajo:

> Desde 1996, tanto en Bogotá como en Medellín, los desfiles del 20 de julio se convierten en contramarchas contra el militarismo y la guerra. Durante las marchas de los cocaleros de 1996, en Florencia (Caquetá), un joven soldado rehúsa atacar a los campesinos y es encarcelado, mientras en los sucesos de desalojo de los vendedores ambulantes en San Victorino un policía de la Fuerza Disponible se niega a participar.

La posibilidad de contar con una razón ética para oponerse a empuñar un arma en Colombia, era una opción ante la guerra. El arte en Colombia durante la década de los 90´s, se establecía como una posibilidad ante la injusticia social y los fenómenos como el narcotráfico, el paramilitarismo y el reclutamiento forzado. Para los jóvenes en los sectores populares de la ciudad, en la dinámica urbana, la reflexión estructural sobre el conflicto armado, la memoria histórica y la vida nacional se traducía en la crudeza de la muerte y la violencia cotidiana. En los barrios de Bogotá, Medellín, Cali aparecían cuerpos sin vida de personas asesinadas sin razón, desapariciones forzadas y el exterminio de la Unión Patriótica. En este momento de país, año 1997, es publicada la canción "Militares", de Gotas de Rap:

> Servicio militar, conmigo no vas a acabar
>
> Servicio que me ata, y me obliga a asesinar
>
> Me manda a un mundo de locos, donde hay que disparar
>
> Las madres no van a callar, un pueblo que se educa y pide libertad
>
> Las balas no van a parar, las madres no van a callar
>
> Latinoamericano gritando dignidad, articulo 18 de mi constitución
>
> Lo dice muy claramente, respete mi decisión
>
> (Gotas de Rap, 1997, 0m23s)

En Bogotá durante los años 90, se desarrolló una sincronía virtuosa entre el Rap y el Teatro. La Opera Rap, liderada por Gotas de Rap[2], Patricia Ariza y Carlos Satizabal, fue un proceso de creación colectiva que ponía en escena teatral, las historias de la vida callejera, la denuncia de la violencia e impunidad en el barrio. Este proyecto artístico, conecto la pregunta por la vida cotidiana y la vida política del país. Previo a este proceso, Javi, integrante de Gotas de Rap, había escrito: Patraña Militar, en el momento cronológico en el cual estaba desarrollando la Opera Rap, Gotas construyo la canción "Militares" en el siguiente contexto, como lo expresa CAP, integrante y productor de Gotas de Rap (CAP, comunicación personal, abril 2022):

> En esa época nosotros pertenecíamos a un parche de objetores de conciencia, estábamos en contra del servicio militar obligatorio y yo también en esa época viví todo el proceso de las batidas, del ejercito; y como en ese tiempo yo estaba terminando el bachillerato, entonces varias veces me llevaron en esas batidas, en el batallón de

[2] Agrupación de Rap Bogotana, proveniente del barrio Las Cruces, originaria del grupo *New Rappers,* dicha agrupación desarrolló las primeras producciones musicales de Rap en Colombia, al igual que fue pionera en el proceso de creación colectiva desde el Rap, a través del proceso de Rap y Teatro Opera Rap durante los años 90´s.



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> mantenimiento me tuvieron un tiempo y me les volé, entonces era remiso. Desde esa época tenía claro que no era un servicio al pueblo.

Estos versos conectan la creación de Rap desde la denuncia y la resistencia, con la memoria histórica de Colombia, sus fenómenos políticos y sociales. Pero Bogotá no era la única ciudad, en la cual las agrupaciones conectadas con la cultura Hip Hop, manifestaban desde el Rap su inconformidad, narraban la memoria, y denunciaban los crímenes de estado. Medellín, Cali, Buenaventura, Barranquilla ya tenían sus propias producciones de Rap, sus procesos de memoria y resistencia ante el olvido y la impunidad. En los años 80 y 90, los carteles del narcotráfico presentaban un imaginario identitario en la sociedad, la cultura y la televisión nacional, fenómeno que se ha extendido hasta la actualidad. El referente de los liderazgos desde la figura de agrupaciones conformadas por reconocidos narcotraficantes y responsables de asesinatos, desapariciones y encarnados en grupos al margen de la ley, impactó la vida de jóvenes que en busca de oportunidades económicas y de reconocimiento social, veían en los carteles de Medellín y de Cali un referente.

En este sentido, el Rap en Colombia seguía manifestándose frente a los fenómenos sociales. Desde el año 1993 una serie de agrupaciones de Rap en Cali, se agremiaron desde la visión de un Rap comprometido socialmente, consciente de las problemáticas territoriales y sociales que implicaban la exclusión social y racial, nace el Cali Rap Cartel, como una resignificación de la categoría cartel, en un contexto territorial y político en el que el cartel se entendía como la agremiación de asesinos y narcotraficantes. Agrupaciones como Artefacto, Zona Marginal, entre otros, se ocuparon de organizar a las agrupaciones de Rap de Cali y luego del País, en un cartel cultural, en el cual las letras de rap, las identidades, las voces y las identidades territoriales y raciales incidían en creaciones literarias, narrativas y musicales para la defensa de los Derechos Humanos, Orador MC (2022), en comunicación personal, fundador del Cali Rap Cartel e integrante de la agrupación Artefacto, nos comparte la siguiente referencia acerca del nombre de ésta agrupación y su relación con el contexto social y político del país en los años 90 (Orador M.C, Comunicación personal Abril 2022).

> "Se llamó así, porque Cali era una ciudad con demasiados grupos de Rap, así que la perspectiva era construir una organización grande que incluyera todas estas agrupaciones. Se llamó Cali Rap Cartel desde un contexto crítico, pensando en que, si existían los carteles de narcotráfico, la gente tenía que contar con una opción distinta, una opción musical, que estuviera conformada por agrupaciones de Rap Contestatario".

Cali, Medellín y Bogotá se fueron manifestando frente a las graves violaciones a los derechos humanos, a los fenómenos sociales de la limpieza social, el paramilitarismo, la guerra. Los años 90 en Colombia tejieron un camino distinto respecto a la identidad del Rap y la cultura Hip Hop, distinto a los estándares de Rap estadounidense, que por la época se centraban en los conflictos internos entre pandillas y vida de *gangsta*, aquí, la preocupación fundamental de artistas de Rap, era la violencia, la desaparición forzada. La exclusión y discriminación social y un diálogo fracturado entre las identidades como el punk, el hip hop y la escuela, hicieron que los vehículos para la denuncia y la narrativa de la barbarie fueran letras rimadas, afirmaciones contundentes y ritmos diversos, al respecto del Cali Rap Cartel Lujan (2016), menciona:

> El trabajo (de demos) del recién conformado Cali Rap Cartel grabado en los estudios de la Universidad del Valle (1996), fue igualmente importante, porque logró crear bajo una difusión clandestina en la ciudad, este tipo de canciones; música con un sentido de reclamo y apropiación territorial, con alta incidencia en la población juvenil. Desde el barrio San Pedro hasta Alfonso López pasando por el Distrito. (p.114)

Las letras tenían una relación con los procesos narrativos y de resistencia conectados con las luchas estudiantiles. La conexión entre descontento social, dolor, pobreza e impunidad y la profundización en el conocimiento de los derechos fundamentales se dio en la relación academia / Hip Hop. Una academia barrial, callejera, revolucionaria. Mocho de la agrupación Laberinto ELC; que se encargó de construir las bases del Rap políticamente comprometido en Colombia, menciona que un importante lugar creativo para el Rap a finales de la década de los 80´s, fueron las aulas de la universidad de Antioquia, al igual que lo evidencia la cita de Lujan (2016), la universidad fue un lugar creativo, al margen de las cátedras académicas, la universidad como lugar, se convirtió en un territorio narrativo para el Rap, durante la década de los 90. Zona Marginal, una de las agrupaciones que integraron el Cali Rap Cartel, presentó en 1999, la canción País en Guerra, nos da el paso a la época del Paramilitarismo en Colombia y la década de las ejecuciones extrajudiciales.

> La guerrilla y el ejército sostienen la fuente,
>
> de la impunidad de la cultura de la muerte.
>
> En ese lugar de exterminio en esa guerra social,
>
> los paramilitares son el actual klu klus klan.
>
> Monopolizan las tierras y causan la iniquidad,
>
> el ejército se encarga de causar la hostilidad.
>
> Cuando cogen a los "culpables" todos caen en la inopia, se hacen los inocentes como siempre en nuestra historia.
>
> (Zona Marginal, 1999, 2m52s)

La década de los 90. marcó una identidad en el Rap colombiano ligada a una posición contestataria



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desde versos; que narraron la situación política del país. Los casetes, medios de almacenamiento magnético, se encargaron de llevar a todos los territorios de Colombia, la estructura, la métrica y la forma de hacer rap, de narrar la realidad de los barrios que dialoga con la realidad global. Cerramos este apartado, dedicado al análisis de los factores sociales y políticos que impactaron la vida de los jóvenes de los sectores populares, para dar paso a la reflexión desde el rap sobre el camino desde los procesos de paz.

2. *El siglo XXI: El necesario verso callejero en los procesos de Paz enfrentando la era del paramilitarismo en Colombia.*

A finales de los años 90, el Hip Hop en Colombia ya contaba con espacios de difusión radial, producciones musicales que inicialmente se divulgaron en formato de casete y posteriormente se amplió la producción y almacenamiento de música en formato CD. A inicios del siglo XXI la escritura, grabación y producción de Rap en Colombia tomo dimensiones mayores. Algunas agrupaciones como Asilo 38 de Cali, Flaco Flow y Melanina de Cali y Buenaventura, Mery Hellen, Laberinto ELC, Sociedad FB7 de la Ciudad de Medellín entre muchas agrupaciones nacionales, promovieron la producción de discos de larga duración como memoria de los procesos barriales, las historias de vida y de país. El Rap colombiano, encarnado en sus intérpretes y creadores, empezó a hacer parte de procesos de participación social, y sin conocer las implicaciones, el Rap se convirtió en la voz testimonial en el marco del conflicto armado en Colombia. Así narra CAP, la relación entre el Álbum Revolución y los procesos de Paz con la insurgencia en Colombia durante los años 90´s e inicios del 2000. (CAP, comunicación persona, Abril de 2022):

> El disco de Gotas se llama Revolución, por todo ese proceso que estábamos viviendo. Estuvimos acompañando las mesas de diálogo, fuimos invitados por las Farc y naciones unidas al Caguán en la época del gobierno de Andrés Pastrana. El parche también fue invitado a Flor del Monte, al proceso de reinserción del Ejército Popular de Liberación EPL, estuvimos con ex combatientes de algunas guerrillas también en diferentes procesos.

En el marco de la apuesta por el fallido proceso de Paz en Colombia, propuesto por el ex presidente Andrés Pastrana, a finales de los 90. Las recién creadas Convivir, se materializaron en procesos de persecución a lideres sindicales, desapariciones forzadas, masacres y el surgimiento del paramilitarismo en el país. En el año 2002 es publicado el disco: Fraseando a prueba de bombas, liderado por Andrea Duran Cárdenas (Lela) Q.E.P.D y DJ Fresh y la compilación de las más importantes agrupaciones de Rap de ese momento histórico de nación. En este disco, se incluyeron creaciones que relataban los barrios, la desaparición, el asesinato y la violencia barrial producto de los procesos socio políticos de los años 90. En relación al título de éste larga duración, podemos observar como la prensa nacional a finales de los 90; específicamente el diario El Tiempo (1999), presentaba la siguiente cronología de las bombas que afectaron la vida y la seguridad en la capital del país, en el marco de la violencia ejercida por grupos armados al margen de la ley.

> 27 de marzo de 1992: Dos bombas estremecieron la zona comercial de Chapinero. 9 de diciembre de 1992: Diez heridos al estallar dinamita en los hoteles Orquídea Real; La Fontana; Tequendama y Hacienda Royal. 21 de enero de 1993: Explotan dos carros bomba. 30 de enero de 1993: Un carro bomba con 100 kilos de dinamita explotó en la carrera 9a. entre las calles 15 y l6, en pleno centro de Bogotá. 15 de febrero de 1993: Estalló una bomba en la calle 16 entre carreras 13 y 14. 15 de abril de 1993: Explotó un carro bomba con 150 kilos de dinamita frente al centro de la 93. 9 de noviembre de 1999: Una bomba con 6 kilos de dinamita explotó frente a una casa del barrio La Esmeralda.

DJ Fresh, pionero en la práctica del DJ en Colombia, expone en comunicación personal (2022), que la motivación principal para desarrollar el Fraseando a Prueba de Bombas fue el contexto social a nivel nacional, y en el marco de esta afectación a los Derechos Humanos, era necesario vincular las voces de raperos de todo el país "Muchas bombas en sacudían a Colombia en esa época, por eso decidí convocar grupos de varias partes del país: Cali, Medellín, Barranquilla, Cartagena, Bogotá" (DJ Fresh, comunicación personal, Abril 2022). Por este motivo hacen parte de éste compilados artistas desde la costa atlántica, hasta el pacífico, pasando por el centro del país; talentos que se enfocaron en narrar la relación del barrio con los problemas sociales y políticos de ese momento histórico. Éste compilado se realizó bajo el sello Voz Pública, "fueron publicadas 500 copias prensadas en Miami (USA), oficialmente no sé hizo lanzamiento". Es importante mencionar que DJ Fresh, en su labor como DJ, posicionó la identidad de los discursos de Jorge Eliecer Gaitán en sus presentaciones en vivo, y en sus intervenciones en canciones grabadas, planteando la relación de mantener vivo el discurso de este líder político asesinado el 9 de abril de 1948 en la ciudad de Bogotá.

En el marco de estas creaciones sociales, musicales y políticas, se publica el álbum larga duración "La Hoguera", de la agrupación Asilo 38 de la ciudad de Cali, dicha colectividad contaba con algunos integrantes que habían hecho parte del ya mencionado Cali Rap Cartel. En éste larga duración, conformado por 10 canciones, presentan al público dos *tracks* que son reveladores en cuanto a las visiones de país y la conexión con el barrio. Carlitos Way y Criminales. La última canción hace un recorrido por la memoria histórica del país, presenta un recuento poético de los magnicidios que marcaron la cotidianidad del territorio colombiano, y cómo; éstas heridas de guerra en los



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cuerpos de lideres políticos, hicieron mella en la herida colectiva de país, conectada con las realidades sociales, barriales y políticas, un fragmento de la canción criminales indica:

Sobrevolando fue que lo atraparon
Con Pizarro los criminales acabaron
Muchos tiros se pudieron escuchar
Nadie sabía ha donde iban aparar
Dicen que uno de ellos ha sido en la
Frente
Porque se lanzaba a ser presidente.
A Galán en la ciudad de Soacha
Lo mataron en su propia campaña,
Muchos corrían otros lloraban
Pero Galán en el piso agonizaba
También hubo otro caso que lamentar
Acabaron con la vida de Jorge Eliécer
Gaitán,
También mataron a un ministro de justicia
Y él se llamaba Lara Bonilla,
La guerra en Colombia todavía sigue fea
Y acribillaron también a Eusebio Muñoz Perea.
(Asilo 38, 2004, 0m19s)

Para la década del 2000, los magnicidios, bombas, narcotráfico, desaparición forzada y limpieza social eran fenómenos sociales que hacían parte de la cotidianidad del país, particularmente porque fueron situaciones que se ejecutaron directamente en las ciudades, en la perspectiva de lo urbano y la visión centralista de los medios masivos de comunicación. Sin embargo, desde décadas atrás, el fenómeno del brazo armado ilegal patrocinado por las fuerzas militares del estado, venia apropiándose de los territorios, vulnerando la vida en la ruralidad y siendo autor de las masacres y desplazamientos del país. El mandato del ex presidente Álvaro Uribe Vélez que inicia en el año 2002, y que desde su política democrática de seguridad ciudadana, inicia el camino para la aprobación de la Ley de Justicia y Paz, que buscó cobijar a quienes hubiesen cometido delitos comunes por Violaciones a Derechos Humanos; aprobandola bajo tramite de ley ordinaria, siendo una ley estatutaria. Esta ley representó la legalización de la vulneración a las víctimas en Colombia, privándoles del derecho a la verdad, la justicia y la reparación (Borrero, G y Paredes, N. 2005).

En ésta época de barbarie e impunidad a nombre de Álvaro Uribe Vélez, el Hip Hop se manifestó de manera contundente. En La comuna 13 de Medellín, más de 200.000 habitantes fueron cercados por helicópteros disparando al margen de los protocolos, convenios o normas reguladas por el Derecho internacional humanitario, con el argumento de quitarle el control de éste territorio a la guerrilla, control que le entrego al Paramilitarismo, que lideró luego los "combos" responsables del asesinato de Kolacho, El Duque, y Medina Raperos, educadores populares y lideres de éste territorio. Pero el Hip Hop, cargado de su potencia identitaria, su coherencia política y su fuerza vital, terminó incidiendo en procesos artísticos de circulación musical, formación y transformación social. Al cumplirse un año de la operación Orión, en el 2003, nace en la comuna 13 el festival Revolución sin muertos, una apuesta colectiva por generar un espacio para la cultura Hip Hop, su circulación y apropiación. Por la misma época, se producía y publicaba el disco En medio de la Guerra, de la agrupación Sociedad FB7 de la Ciudad de Medellín. Ésta producción musical, es una de cientos en el país, sin embargo es clave en la relación Memoria histórica, educación y rap. David Medina educador popular, trabajador social conectó temas, categorías y relato histórico. Lupa, productor musical y Rapero, presentó la conexión sonora y el Rap que denunciaba los hechos violentos que se vivían en ese momento a nivel nacional, integrada por los ya mencionados artistas y Junior Ruiz, presentan la canción que da lugar al nombre de larga duración: En Medio de la Guerra (2004)

mano dura para golpear corazón grande para llorar
momentos lo han de corroborar
libertad para con elocuencia borrar
masacres desplazamientos al no parar cobrar
la flor no nace para adorar interrupción del ciclo vital
ellas y ellos en medio fatal se hace criminal
desaparición la noticia busca el canal
lluvia de fuego el mundo es rival
cubiertos por este mal, sí la guerra es contra la guerra el
hombre sí que está mal
(Sociedad FB7, 2002, 4m38s)

En las comunas 6, 9, 13 y 15 de Medellín arreciaban las balas y la violencia estatal durante el mandato presidencial de Álvaro Uribe. Sin embargo, los jóvenes provenientes de estos territorios golpeados por la guerra lideraban procesos educativos, artísticos y trazaban el camino para conectar la academia y el Hip Hop. Pero el paramilitarismo, la estigmatización social y la acción violenta contra la insurgencia por parte del estado, también golpeó al Hip Hop y la vida de sus artistas. Martin Batalla, Rapero de la comuna 15 del sur de Medellín, del icónico crew SurtSaiClika. se encontraba estudiando Séptimo semestre de derecho, el 10 de febrero del año 2005, durante la explosión en la Universidad de Antioquia, en el marco de movilizaciones estudiantiles contra el TLC, Es detenido



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Martin; lo llevan preso sindicado de terrorismo y rebelión, con el 23% de su cuerpo afectado por la explosión.

A Martin lo trasladan al hospital, la fiscalía que en ese entonces se encontraba ubicada en el comando elite contra el terrorismo abre oficio contra Martin, los mismos que oficiaron los procesos y desarrollaron la operación Orión, era una fiscalía que operaba casi desde las fuerzas militares y que a todos aquellos heridos durante la explosión los sindicaron de delitos tan complejos como rebelión, terrorismo y más delitos agravados, delitos que como mínimo acarreaban 38 años de cárcel. Jurídicamente determinaron que ellos, los afectados eran culpables y fueron remitidos a la cárcel, al patio de presos políticos, así titulo el diario El tiempo (2005), la captura de éstos estudiantes.

> La historia de una protesta contra la reelección del presidente -Alvaro Uribe y el TLC, que comenzó el pasado 10 de febrero, terminó ayer con la captura de 14 estudiantes de la Universidad de Antioquia. Los sindican de ser guerrilleros del Eln y las Farc, de participar en los disturbios y de provocar una explosión ese día, que dejó dos estudiantes muertas y 17 heridos.

En el momento que Martín es capturado sindicado de terrorismo y rebelión, era un estudiante, que promovía el desarrollo de cine foros, actividades artísticas y conversatorios en el marco de la Defensa de los Derechos Humanos no conocía ni estaba cerca de la revolución armada. Aun así fue ubicado en el patio de presos políticos. En comunicación personal desarrollada en 2021 con Martin, expresa (Batalla Martin, Comunicación personal, marzo 2021):

> "allí hacer rap era muy complicado, cerrar los ojos y concentrarse en una letra como acostumbrara en los estudios de grabación del sur de Medellín no era posible entre el hacinamiento de la cárcel. Al llegar al pasillo no podía escribir rap, pero me impacto el compromiso de las organizaciones allí ubicadas, organizaciones militantes de izquierda en su mayoría y que evidenciaban compromiso, disciplina, horarios de estudio, orden".

Martín Batalla y Mocho desarrollaron la propuesta artística: "Monte Adentro", como premonitoriamente seria su cotidianidad los siguientes años. Con este grupo asistieron a la cuarta cumbre de Hip Hop en Venezuela. Dos años después de estar en la cárcel Martín fue declarado inocente. Salió a seguir estudiando y grabando Rap. Durante ese tiempo grabó producciones con agrupaciones como Juanjo y Tes, Juan Sinatra, Mery Hellen, MC Kno, De Bruces a Mi, con Cap, Kiño y Mery Hellen. Sin embargo, el estado ordenó su captura a manos de grupos al margen de la ley vinculados con el paramilitarismo, y esta persecución hizo que Martin saliera una mañana a la universidad, con ese mismo morral partió hacia la serranía del Perijá, al frente 36 del nordeste antioqueño de las Farc en el Bajo cauca, pudo hablar con su mamá 6 meses después de que salió esa mañana a estudiar. Con Martin Batalla tuvimos oportunidad de coincidir en Venezuela y volvimos a encontrarnos en el año 2017, después de la dejación de armas en el marco de la firma del acuerdo de Paz con las FARC EP.

Éste es el relato que Martin Batalla, comparte conmigo en el marco de conversaciones personales, confianza y camaradería. Relata la situación política de los estudiantes y artistas durante la persecución armada del estado a las acciones creativas en el barrio y en las aulas. En la actualidad Martin lidera el proceso productivo Confecciones de la Montaña, es firmante del acuerdo de Paz en la habana. Hace música con determinadas limitaciones auditivas que le dejó la guerra, los bombardeos y el sonido de los fusiles.

La década del 2000 y las políticas estatales en Colombia, dejaron profundas heridas causadas por la guerra al movimiento Hip Hop colombiano. Persecución, asesinatos, vulneración de los Derechos Humanos, ante dicha situación, los lideres de este movimiento se organizaron, en agrupaciones, crews, escuelas de Hip Hop, procesos. En esta década se registra una altísima producción sonora, audiovisual, grafica, dancística. Parecía que de un lado el Estado y los grupos al margen de la ley atacaban con balas y del otro lado de la trinchera millones de Raperos, Graffieros, Bailarines y DJ´s perfeccionaban sus prácticas artísticas para combatir la barbarie. Es incalculable, y no es posible siquiera hacer un listado de todas las producciones artísticas que surgieron en esta década en Colombia, haciéndole frente al olvido y la impunidad.

Antes de cerrar éste apartado sobre éstos 10 años de resistencia artística, es importante mencionar el trabajo creativo del documental Frekuesia Kolombia, publicado en 2008, desarrollado por Intermundos y que se encargó por primera vez en el trabajo audiovisual, de realizar un relato de las resistencias nacionales desde el Rap, convocando a agrupaciones como Por Razones de Estado, Choquibtown, sociedad FB7, Siniestras conspiraciones, para enunciar las luchas políticas, sociales y territoriales desde el Hip Hop. En el marco de la resistencia social, se realiza el trabajo discográfico: Bandas del Sur, comandado por Bolívar, que, en el segundo frente o segunda entrega, incluye las canciones Himno En Revolución de Diana Avella. Por otro lado, el compilado No + Guerra, liderado por el colectivo de artistas denominado Colectivo Revolución y Rimas y en el cual se presentaron canciones de las agrupaciones Santacruz Medina, La Cúpula y Cescru enlace, quienes incluyen el sencillo Éxodo (2005)

> Tención permanente debate entre vida y muerte
>
> Al sur norte, occidente y al oriente está el presente
>
> éxodo obligado por culpa de la violencia
>
> la guerra es un ser de incomprensible absurda ciencia.
>
> (Cescru Enlace, 2003, 0m27s)



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3. *Decenio de Movilizaciones: La fuerza popular del Hip Hop colombiano.*

Para concluir la reflexión sobre el lugar del Hip Hop en la memoria histórica de Colombia, desarrollamos el presente apartado, en el cual conectamos las grandes movilizaciones del decenio comprendido entre el 2011 y el 2021 con los procesos artísticos de Rap, Graffiti, Break Dance y DJ. La reflexión por la movilización social incidida por el Rap, las posibilidades de difusión de almacenamiento digital que permite este momento de la historia, facilita los procesos de comunicación de las narrativas de convocatoria a la movilización, acompañamiento a la misma y relato de ella.

Para plantear el análisis entre las producciones artísticas y las principales movilizaciones ciudadanas de éste decenio, mencionaremos en primer lugar el proceso de movilización estudiantil que se llevó a cabo en el país, en respuesta a la radicación del proyecto de ley de 112 para la reforma de la ley 30 de educación superior, que entre otras propuestas, planteaba la solución a los problemas de cobertura educativa desde el sistema de financiación bancario, con créditos otorgados por entidades privadas que no solucionaban la necesidad de acceso a la educación superior, sino que apalancaban el sistema crediticio fortaleciendo entidades financieras de orden privado.

Para acompañar el proceso de movilización nacional, el Hip Hop colombiano una vez más levanto su voz. Durante el festival Internacional Altavoz, en Octubre de 2011, la propuesta Diana Avella es invitada como artista nacional. En ese momento de levantamiento popular de la juventud organizada desde el movimiento estudiantil se manifestaba en las calles, el equipo artístico se centró en proponer un repertorio musical y una puesta en escena que respondiera a esa movilización nacional con respaldo desde versos revolucionarios a la insistencia por la defensa de la educación pública. Frente a más de 10mil personas, acompañamos el proceso de resistencia popular colocando a favor de la memoria histórica el rap como herramienta.

Para el año 2012, las expresiones de inconformidad y resistencia, animando al mandato popular evidente en la movilización social creció. Ahora las letras de Rap eran más explicitas, los procesos de agremiación social para exigir derechos se conectaban con organizaciones nacionales y de forma directa el Rap convocaba a las calles hasta lograr hacer respetar el sentir de las organizaciones sociales, populares, estudiantiles y sindicales. El quehacer artístico desde el Hip Hop en las regiones se evidenció en producciones musicales, procesos de construcción colectiva, procesos formativos y acciones de resistencia, durante los primeros años de éste decenio, y en perspectiva de respaldo a la organización y movilización social.

En Villavicencio, en Octubre de 2012, se conforma la agremiación de artistas denominada E.K.O Ejercito Kontra la Opresión, se expresan en la canción: En pie de lucha, al respecto de la necesidad de levantar la voz "¿Delincuente yo?, si es por pelear por mis derechos, que me condenen a la muerte y ni siquiera así, (…) si no nos dejan soñar, por que nosotros dejarlos dormir" (EKO, 2012, 3m14s). En la ciudad de Cúcuta. Durante el año 2013, se llevó a cabo el primer festival de Hip Hop de éste territorio, en el marco de dicho evento se venía liderando el proceso agremiativo alrededor del graffiti, el break dance y el Rap, que dio como resultado la canción: Del norte Bravos Hijos, en la cual los artistas se refieren al lugar del arte en los procesos ciudadanos, en la transformación de los imaginarios migratorios y de la necesidad de levantar las voces en medio de la violencia "Esta es la historia de una tierra, en que guerreras y guerreros, con su arte prometieron, aportar al mundo entero, se reunieron, hicieron del arte su templo, no estaba en ningún lugar, ellos lo llevaban dentro" (5ta con 5ta, 2013, 1m10s). En la ciudad de Medellín, en el año 2011, más de 50 raperos, artistas de Graffiti, DJ y MC, con trayectorias relevantes, se unieron para desarrollar el proyecto: Conspiración por la paz. Esta creación artística, tuvo el interés de poder ambientar el debate en torno a la necesidad de la paz, alrededor de los territorios en guerra, tanto urbana como rural.

En el marco de las acciones sociales y políticas que desencadenaron el refrendamiento de los acuerdos de paz, a través del plebiscito. Las regiones expresaron su mandato popular a través del proceso democrático llevado a cabo en 2016, Buenaventura manifestó a través de las urnas estar de acuerdo con el acuerdo final para la terminación del conflicto y la construcción de paz, con el 57, 68% de votos por el Si, es importante mencionar que a nivel nacional, el No ganó la consulta con un 50. 21%. La voluntad de paz, y la necesidad de avanzar en verdad, justicia y reparación, en uno de los territorios más golpeados por la violencia en el país. En ese proceso de defensa social y artística, por la posibilidad de paz, el Rapero Leonard Rentería, fundador del proceso de formación: Voces Urbanas, en uno de las visitas del entonces senador Álvaro Uribe a Buenaventura, se manifiesta por la defensa de la paz, esto le acarreo de nuevo la vulneración a sus derechos, desplazamiento interno y amenazas de muerte. Un año después de éste acontecimiento, durante el paro civico de Buenaventura el Rap volvió a manifestarse, así lo expresamos (Avella, 2018) en el artículo desarrollado en el 2018, para la revista Arcadia en el texto "El Hip Hop se planta digno"

> El rap de Buenaventura no es, entonces, una noticia nueva, y ha dignificado al territorio por mucho tiempo. En los barrios más difíciles de Buenaventura, los profesores de Hip Hop tienen mayor legitimidad y respeto que las autoridades. En el paro cívico de 2017, doce artistas



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> de Hip Hop se unieron para cantar "Buenaventura no se rinde", una canción que dignificó a los trabajadores y le devolvió la fe, la unidad, la dignidad y la fuerza al pueblo. Ese es una de tantas historias que revelan que el Hip Hop en Buenaventura no es solo una expresión artística, también es una herramienta de lucha social.
>
> También está el caso Leonard Rentería, quien supo llenarse de valor y enfrentarse al No en el plebiscito; eso a pesar del miedo por las desapariciones y las muertes de jóvenes en su territorio a manos de grupos paramilitares. Leonard sabe de lo que habla. Ha sido víctima del desplazamiento interno, y la guerra se ha llevado a amigos de infancia y miembros de su grupo. Uno de sus integrantes fue asesinado casi en la puerta de su casa. (p.41)

Durante el año 2019, el país entero salió a las calles, en una gran movilización convocada por las centrales obreras, estudiantes, firmantes de paz y ciudadanía en general. La fuerza artística también se movilizó ampliamente, la creación de canciones de Rap en el marco de esta acción popular se convirtió en la cotidianidad, a diario a través de plataformas de almacenamiento digital se publicaron cientos de fragmentos, canciones, producciones narrativas en torno al paro nacional. En prensa internacional se registró el hecho como una de las afrentas más violentas del gobierno nacional liderado por Iván Duque más agresivas a la población, BBC menciona lo siguiente alrededor de la movilización nacional:

> Es probable que la historia recuerde al paro nacional del 21 de noviembre en Colombia como el día en que los colombianos, una población traumatizada por un conflicto armado de 60 años, mostraron su disposición a salir a la calle. Pese a la lluvia. Pese a la represión.

El Rap se manifestó una vez más con claridad, versos coherentes, posición política y social. Las voces de artistas alrededor del país no se hicieron esperar y se unieron a la voz popular con producciones musicales de alta producción sonora, importante calidad audiovisual y números de reproducción en plataformas digitales como Instagram, Facebook y Youtube que ni siquiera el presidente o algún partido político podrían alcanzar en horas. Anarkia; rapera procedente de Cundinamarca en el centro del país, presentó públicamente la canción: De esto te hablamos, Viejo, que expresa:

> Por mi tierra, yo me paro
>
> Con todo y mi miedo a cuestas
>
> De aparecer mañana con un par de botas puestas
>
> Alza la voz mi hermano
>
> Pa que nos escuche el cerdo
>
> Y deje de hacerse el guevo
>
> Con eso de "De que me estás hablando viejo"
>
> (Anarkia, 2019, 1m05s)

Días después de la publicación de esta canción, uno de los más importantes Raperos latinoamericanos de origen colombiano, Ali A.K.A Mind, publico la canción: Emancipación, una canción que acompaña desde la fuerza vital de resistirse ante los discursos clásicos de la política nacional, la canción fue publicada el 6 de diciembre de 2019 y expresa lo siguiente: "No es novedad. Nos sacan el jugo, No quieren que pensemos, Ni que nos eduquemos, Ni que les protestemos, Quieren que estemos mudos, que solo trabajemos, Y adoremos al verdugo" (Ali A.K.A MIND, 2019, 2m00s).

Dos años despues la más grande movilización de la historia en Colombia llegó a las calles, de nuevo la convocatoria a movilizarse en contra de la reforma tributaria, rebaso las expectativas de las centrales obreras y trabajadoras. En todas las ciudades del país la calle se convirtió en lugar de dignidad obrera y popular. Los artistas del movimiento Hip Hop, que en múltiples ocasiones fueron objeto de estigmatización por parte del estado y los medios de comunicación pusieron a favor de la expresión social de inconformidad sus creaciones artísticas. El Graffiti se convirtió en la voz unificada de los sin voz. En ciudades como Medellín, Ibagué, Boyacá, Barranquilla, Cucuta, Bogotá, Calí, grandes colectivos de graffiti se juntaron de manera autogestionada para expresar en frases, palabras e iconos el dolor y la fuerza del pueblo.

Para concluir éste capítulo, es necesario hacer memoria de los artistas que en el marco del paro nacional, fueron asesinados por manos criminales cobijadas por el estado colombiano y su accionar impune. En la ciudad de Cali, el artista de graffiti Flex, proveniente de Buenaventura Junior Jein banda sonora de la película: Somos Calentura que reflejó el potencial de la música urbana son asesinados en el marco del paro nacional, en Bogotá el artista de la agrupación Masai Ban-Go Dylan By Lión pierde la vida; al ser atropellado por una tanqueta de la policía metropolitana. El Hip Hop colombiano ha puesto su voz, su dignidad, creatividad y su lucha por los Derechos fundamentales de la población colombiana, ante el miedo y las amenazas por parte del estado, como las que recibimos en 2020 por parte del ejercito nacional a causa de la publicación de la canción "Militares" en la cual tuve participación junto con el grupo de Rap Reincidentes. A pesar de todo seguimos saliendo a las calles de manera masiva, y acompañando la memoria histórica de éste país.

Éste capítulo cierra con un fragmento de la canción: Nos están matando del cantante Yoky Barrios y el actor y también rapero Juan Pablo Barragán. Ésta canción fue publicada en Junio de 2021, en ese momento el país vivía una confrontación urbana, en la cual la fuerza pública efectuaba violencia indiscriminada hacia los marchantes. En éste momento al ser divulgada ésta sonoridad, la misma se convierte en una especie de himno de los marchantes, ésta canción es un oasis en medio del llanto, los gritos y el dolor, pero



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es también un grito de dignidad de las personas que nos encontrábamos al otro lado de la primera línea, del lado de los estudiantes, trabajadores, ciudadanos que nos movilizábamos por la vida y en contra de las políticas criminales del estado. Juan pablo nos compartió lo siguiente (Barragan, Juan Pablo, comunicación personal, Abril 2022):

> Esa noche lloré mucho, y dije, tenemos que hacer algo, y llamé a Yoky y le dije "Tenemos que hacer algo con lo que esta pasando" y quiero que hagamos una canción, porque uno no se puede quedar callado; como artista, como actor, como musico, o para que se es musico, para que se es artista, si no es para pertenecer al contexto y hablar del contexto en el que uno vive. Quería hacer un tributo a toda la gente que estaba parándose en los barrios, en los pueblos, en los corregimientos, a toda la gente que era la que resistía.

Para cerrar éste capítulo alrededor del Hip Hop como memoria colectica, compartimos un fragmento de la canción "Nos están matando", la cual, refleja la fuerza y espíritu de la lucha por la defensa de la vida y los derechos humanos en Colombia a ritmo de Rap.

> La primera línea sacrifica vidas por nuestros derechos
>
> Igual que la minga Indígena mártires poniendo el pecho
>
> Y así nos censuren y los medios tergiversen los hechos
>
> El mundo ya sabe quiénes son los criminales al acecho
>
> ¡Canto con despecho! Soy la voz de un país insatisfecho
>
> Que reclama por los desaparecidos a lo
>
> Malhecho
>
> Por qué un pobre mata a un pobre y lo trata como un desecho
>
> Y el que ordena y envenena está descansando en su lecho
>
> Tras del hecho nos siguen cogiendo de flechos
>
> La guerra es un negocio y le sacan mucho provecho
>
> Mi canción es una roca que lanza un rebelde arrecho
>
> Por hablar puedo terminar en un cajón estrecho.
>
> (Yoky Barrios y El Barragán, 2021, 1m26s)



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It is required for authors to declare all financial, institutional, and personal relationships with other individuals and organizations that could influence (bias) their research.

## Policy on Plagiarism

Plagiarism is not acceptable in Global Journals submissions at all.

Plagiarized content will not be considered for publication. We reserve the right to inform authors' institutions about plagiarism detected either before or after publication. If plagiarism is identified, we will follow COPE guidelines:

Authors are solely responsible for all the plagiarism that is found. The author must not fabricate, falsify or plagiarize existing research data. The following, if copied, will be considered plagiarism:

- Words (language)
- Ideas
- Findings
- Writings
- Diagrams
- Graphs
- Illustrations
- Lectures

- Printed material
- Graphic representations
- Computer programs
- Electronic material
- Any other original work

## Authorship Policies

Global Journals follows the definition of authorship set up by the Open Association of Research Society, USA. According to its guidelines, authorship criteria must be based on:

1. Substantial contributions to the conception and acquisition of data, analysis, and interpretation of findings.
2. Drafting the paper and revising it critically regarding important academic content.
3. Final approval of the version of the paper to be published.

**Changes in Authorship**

The corresponding author should mention the name and complete details of all co-authors during submission and in manuscript. We support addition, rearrangement, manipulation, and deletions in authors list till the early view publication of the journal. We expect that corresponding author will notify all co-authors of submission. We follow COPE guidelines for changes in authorship.

**Copyright**

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**Appealing Decisions**

Unless specified in the notification, the Editorial Board's decision on publication of the paper is final and cannot be appealed before making the major change in the manuscript.

**Acknowledgments**

Contributors to the research other than authors credited should be mentioned in Acknowledgments. The source of funding for the research can be included. Suppliers of resources may be mentioned along with their addresses.

**Declaration of funding sources**

Global Journals is in partnership with various universities, laboratories, and other institutions worldwide in the research domain. Authors are requested to disclose their source of funding during every stage of their research, such as making analysis, performing laboratory operations, computing data, and using institutional resources, from writing an article to its submission. This will also help authors to get reimbursements by requesting an open access publication letter from Global Journals and submitting to the respective funding source.

## Preparing your Manuscript

Authors can submit papers and articles in an acceptable file format: MS Word (doc, docx), LaTeX (.tex, .zip or .rar including all of your files), Adobe PDF (.pdf), rich text format (.rtf), simple text document (.txt), Open Document Text (.odt), and Apple Pages (.pages). Our professional layout editors will format the entire paper according to our official guidelines. This is one of the highlights of publishing with Global Journals—authors should not be concerned about the formatting of their paper. Global Journals accepts articles and manuscripts in every major language, be it Spanish, Chinese, Japanese, Portuguese, Russian, French, German, Dutch, Italian, Greek, or any other national language, but the title, subtitle, and abstract should be in English. This will facilitate indexing and the pre-peer review process.

The following is the official style and template developed for publication of a research paper. Authors are not required to follow this style during the submission of the paper. It is just for reference purposes.

***Manuscript Style Instruction (Optional)***

- Microsoft Word Document Setting Instructions.
- Font type of all text should be Swis721 Lt BT.
- Page size: 8.27" x 11'", left margin: 0.65, right margin: 0.65, bottom margin: 0.75.
- Paper title should be in one column of font size 24.
- Author name in font size of 11 in one column.
- Abstract: font size 9 with the word "Abstract" in bold italics.
- Main text: font size 10 with two justified columns.
- Two columns with equal column width of 3.38 and spacing of 0.2.
- First character must be three lines drop-capped.
- The paragraph before spacing of 1 pt and after of 0 pt.
- Line spacing of 1 pt.
- Large images must be in one column.
- The names of first main headings (Heading 1) must be in Roman font, capital letters, and font size of 10.
- The names of second main headings (Heading 2) must not include numbers and must be in italics with a font size of 10.

***Structure and Format of Manuscript***

The recommended size of an original research paper is under 15,000 words and review papers under 7,000 words. Research articles should be less than 10,000 words. Research papers are usually longer than review papers. Review papers are reports of significant research (typically less than 7,000 words, including tables, figures, and references)

A research paper must include:

a) A title which should be relevant to the theme of the paper.
b) A summary, known as an abstract (less than 150 words), containing the major results and conclusions.
c) Up to 10 keywords that precisely identify the paper's subject, purpose, and focus.
d) An introduction, giving fundamental background objectives.
e) Resources and techniques with sufficient complete experimental details (wherever possible by reference) to permit repetition, sources of information must be given, and numerical methods must be specified by reference.
f) Results which should be presented concisely by well-designed tables and figures.
g) Suitable statistical data should also be given.
h) All data must have been gathered with attention to numerical detail in the planning stage.

Design has been recognized to be essential to experiments for a considerable time, and the editor has decided that any paper that appears not to have adequate numerical treatments of the data will be returned unrefereed.

i) Discussion should cover implications and consequences and not just recapitulate the results; conclusions should also be summarized.
j) There should be brief acknowledgments.
k) There ought to be references in the conventional format. Global Journals recommends APA format.

Authors should carefully consider the preparation of papers to ensure that they communicate effectively. Papers are much more likely to be accepted if they are carefully designed and laid out, contain few or no errors, are summarizing, and follow instructions. They will also be published with much fewer delays than those that require much technical and editorial correction.

The Editorial Board reserves the right to make literary corrections and suggestions to improve brevity.

## Format Structure

***It is necessary that authors take care in submitting a manuscript that is written in simple language and adheres to published guidelines.***

All manuscripts submitted to Global Journals should include:

**Title**

The title page must carry an informative title that reflects the content, a running title (less than 45 characters together with spaces), names of the authors and co-authors, and the place(s) where the work was carried out.

**Author details**

The full postal address of any related author(s) must be specified.

**Abstract**

The abstract is the foundation of the research paper. It should be clear and concise and must contain the objective of the paper and inferences drawn. It is advised to not include big mathematical equations or complicated jargon.

Many researchers searching for information online will use search engines such as Google, Yahoo or others. By optimizing your paper for search engines, you will amplify the chance of someone finding it. In turn, this will make it more likely to be viewed and cited in further works. Global Journals has compiled these guidelines to facilitate you to maximize the web-friendliness of the most public part of your paper.

**Keywords**

A major lynchpin of research work for the writing of research papers is the keyword search, which one will employ to find both library and internet resources. Up to eleven keywords or very brief phrases have to be given to help data retrieval, mining, and indexing.

One must be persistent and creative in using keywords. An effective keyword search requires a strategy: planning of a list of possible keywords and phrases to try.

Choice of the main keywords is the first tool of writing a research paper. Research paper writing is an art. Keyword search should be as strategic as possible.

One should start brainstorming lists of potential keywords before even beginning searching. Think about the most important concepts related to research work. Ask, “What words would a source have to include to be truly valuable in a research paper?” Then consider synonyms for the important words.

It may take the discovery of only one important paper to steer in the right keyword direction because, in most databases, the keywords under which a research paper is abstracted are listed with the paper.

**Numerical Methods**

Numerical methods used should be transparent and, where appropriate, supported by references.

**Abbreviations**

Authors must list all the abbreviations used in the paper at the end of the paper or in a separate table before using them.

**Formulas and equations**

Authors are advised to submit any mathematical equation using either MathJax, KaTeX, or LaTeX, or in a very high-quality image.

**Tables, Figures, and Figure Legends**

Tables: Tables should be cautiously designed, uncrowned, and include only essential data. Each must have an Arabic number, e.g., Table 4, a self-explanatory caption, and be on a separate sheet. Authors must submit tables in an editable format and not as images. References to these tables (if any) must be mentioned accurately.

**Figures**

Figures are supposed to be submitted as separate files. Always include a citation in the text for each figure using Arabic numbers, e.g., Fig. 4. Artwork must be submitted online in vector electronic form or by emailing it.

## Preparation of Eletronic Figures for Publication

Although low-quality images are sufficient for review purposes, print publication requires high-quality images to prevent the final product being blurred or fuzzy. Submit (possibly by e-mail) EPS (line art) or TIFF (halftone/ photographs) files only. MS PowerPoint and Word Graphics are unsuitable for printed pictures. Avoid using pixel-oriented software. Scans (TIFF only) should have a resolution of at least 350 dpi (halftone) or 700 to 1100 dpi (line drawings). Please give the data for figures in black and white or submit a Color Work Agreement form. EPS files must be saved with fonts embedded (and with a TIFF preview, if possible).

For scanned images, the scanning resolution at final image size ought to be as follows to ensure good reproduction: line art: >650 dpi; halftones (including gel photographs): >350 dpi; figures containing both halftone and line images: >650 dpi.

Color charges: Authors are advised to pay the full cost for the reproduction of their color artwork. Hence, please note that if there is color artwork in your manuscript when it is accepted for publication, we would require you to complete and return a Color Work Agreement form before your paper can be published. Also, you can email your editor to remove the color fee after acceptance of the paper.

## Tips for writing a good quality Social Science Research Paper

Techniques for writing a good quality homan social science research paper:

***1. Choosing the topic***: In most cases, the topic is selected by the interests of the author, but it can also be suggested by the guides. You can have several topics, and then judge which you are most comfortable with. This may be done by asking several questions of yourself, like "Will I be able to carry out a search in this area? Will I find all necessary resources to accomplish the search? Will I be able to find all information in this field area?" If the answer to this type of question is "yes," then you ought to choose that topic. In most cases, you may have to conduct surveys and visit several places. Also, you might have to do a lot of work to find all the rises and falls of the various data on that subject. Sometimes, detailed information plays a vital role, instead of short information. Evaluators are human: The first thing to remember is that evaluators are also human beings. They are not only meant for rejecting a paper. They are here to evaluate your paper. So present your best aspect.

***2. Think like evaluators:*** If you are in confusion or getting demotivated because your paper may not be accepted by the evaluators, then think, and try to evaluate your paper like an evaluator. Try to understand what an evaluator wants in your research paper, and you will automatically have your answer. Make blueprints of paper: The outline is the plan or framework that will help you to arrange your thoughts. It will make your paper logical. But remember that all points of your outline must be related to the topic you have chosen.

***3. Ask your guides:*** If you are having any difficulty with your research, then do not hesitate to share your difficulty with your guide (if you have one). They will surely help you out and resolve your doubts. If you can't clarify what exactly you require for your work, then ask your supervisor to help you with an alternative. He or she might also provide you with a list of essential readings.

***4. Use of computer is recommended:*** As you are doing research in the field of homan social science then this point is quite obvious. Use right software: Always use good quality software packages. If you are not capable of judging good software, then you can lose the quality of your paper unknowingly. There are various programs available to help you which you can get through the internet.

***5. Use the internet for help:*** An excellent start for your paper is using Google. It is a wondrous search engine, where you can have your doubts resolved. You may also read some answers for the frequent question of how to write your research paper or find a model research paper. You can download books from the internet. If you have all the required books, place importance on reading, selecting, and analyzing the specified information. Then sketch out your research paper. Use big pictures: You may use encyclopedias like Wikipedia to get pictures with the best resolution. At Global Journals, you should strictly follow here.

***6. Bookmarks are useful:*** When you read any book or magazine, you generally use bookmarks, right? It is a good habit which helps to not lose your continuity. You should always use bookmarks while searching on the internet also, which will make your search easier.

***7. Revise what you wrote:*** When you write anything, always read it, summarize it, and then finalize it.

***8. Make every effort:*** Make every effort to mention what you are going to write in your paper. That means always have a good start. Try to mention everything in the introduction—what is the need for a particular research paper. Polish your work with good writing skills and always give an evaluator what he wants. Make backups: When you are going to do any important thing like making a research paper, you should always have backup copies of it either on your computer or on paper. This protects you from losing any portion of your important data.

***9. Produce good diagrams of your own:*** Always try to include good charts or diagrams in your paper to improve quality. Using several unnecessary diagrams will degrade the quality of your paper by creating a hodgepodge. So always try to include diagrams which were made by you to improve the readability of your paper. Use of direct quotes: When you do research relevant to literature, history, or current affairs, then use of quotes becomes essential, but if the study is relevant to science, use of quotes is not preferable.

***10. Use proper verb tense:*** Use proper verb tenses in your paper. Use past tense to present those events that have happened. Use present tense to indicate events that are going on. Use future tense to indicate events that will happen in the future. Use of wrong tenses will confuse the evaluator. Avoid sentences that are incomplete.

***11. Pick a good study spot:*** Always try to pick a spot for your research which is quiet. Not every spot is good for studying.

***12. Know what you know:*** Always try to know what you know by making objectives, otherwise you will be confused and unable to achieve your target.

***13. Use good grammar:*** Always use good grammar and words that will have a positive impact on the evaluator; use of good vocabulary does not mean using tough words which the evaluator has to find in a dictionary. Do not fragment sentences. Eliminate one-word sentences. Do not ever use a big word when a smaller one would suffice.

Verbs have to be in agreement with their subjects. In a research paper, do not start sentences with conjunctions or finish them with prepositions. When writing formally, it is advisable to never split an infinitive because someone will (wrongly) complain. Avoid clichés like a disease. Always shun irritating alliteration. Use language which is simple and straightforward. Put together a neat summary.

***14. Arrangement of information:*** Each section of the main body should start with an opening sentence, and there should be a changeover at the end of the section. Give only valid and powerful arguments for your topic. You may also maintain your arguments with records.

***15. Never start at the last minute:*** Always allow enough time for research work. Leaving everything to the last minute will degrade your paper and spoil your work.

***16. Multitasking in research is not good:*** Doing several things at the same time is a bad habit in the case of research activity. Research is an area where everything has a particular time slot. Divide your research work into parts, and do a particular part in a particular time slot.

***17. Never copy others' work:*** Never copy others' work and give it your name because if the evaluator has seen it anywhere, you will be in trouble. Take proper rest and food: No matter how many hours you spend on your research activity, if you are not taking care of your health, then all your efforts will have been in vain. For quality research, take proper rest and food.

***18. Go to seminars:*** Attend seminars if the topic is relevant to your research area. Utilize all your resources.
Refresh your mind after intervals: Try to give your mind a rest by listening to soft music or sleeping in intervals. This will also improve your memory. Acquire colleagues: Always try to acquire colleagues. No matter how sharp you are, if you acquire colleagues, they can give you ideas which will be helpful to your research.

***19. Think technically:*** Always think technically. If anything happens, search for its reasons, benefits, and demerits. Think and then print: When you go to print your paper, check that tables are not split, headings are not detached from their descriptions, and page sequence is maintained.

***20. Adding unnecessary information:*** Do not add unnecessary information like "I have used MS Excel to draw graphs." Irrelevant and inappropriate material is superfluous. Foreign terminology and phrases are not apropos. One should never take a broad view. Analogy is like feathers on a snake. Use words properly, regardless of how others use them. Remove quotations. Puns are for kids, not grunt readers. Never oversimplify: When adding material to your research paper, never go for oversimplification; this will definitely irritate the evaluator. Be specific. Never use rhythmic redundancies. Contractions shouldn't be used in a research paper. Comparisons are as terrible as clichés. Give up ampersands, abbreviations, and so on. Remove commas that are not necessary. Parenthetical words should be between brackets or commas. Understatement is always the best way to put forward earth-shaking thoughts. Give a detailed literary review.

***21. Report concluded results:*** Use concluded results. From raw data, filter the results, and then conclude your studies based on measurements and observations taken. An appropriate number of decimal places should be used. Parenthetical remarks are prohibited here. Proofread carefully at the final stage. At the end, give an outline to your arguments. Spot perspectives of further study of the subject. Justify your conclusion at the bottom sufficiently, which will probably include examples.

***22. Upon conclusion:*** Once you have concluded your research, the next most important step is to present your findings. Presentation is extremely important as it is the definite medium though which your research is going to be in print for the rest of the crowd. Care should be taken to categorize your thoughts well and present them in a logical and neat manner. A good quality research paper format is essential because it serves to highlight your research paper and bring to light all necessary aspects of your research.

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## Informal Guidelines of Research Paper Writing

***Key points to remember:***

- Submit all work in its final form.
- Write your paper in the form which is presented in the guidelines using the template.
- Please note the criteria peer reviewers will use for grading the final paper.

**Final points:**

One purpose of organizing a research paper is to let people interpret your efforts selectively. The journal requires the following sections, submitted in the order listed, with each section starting on a new page:

*The introduction:* This will be compiled from reference matter and reflect the design processes or outline of basis that directed you to make a study. As you carry out the process of study, the method and process section will be constructed like that. The results segment will show related statistics in nearly sequential order and direct reviewers to similar intellectual paths throughout the data that you gathered to carry out your study.

**The discussion section:**

This will provide understanding of the data and projections as to the implications of the results. The use of good quality references throughout the paper will give the effort trustworthiness by representing an alertness to prior workings.

Writing a research paper is not an easy job, no matter how trouble-free the actual research or concept. Practice, excellent preparation, and controlled record-keeping are the only means to make straightforward progression.

**General style:**

Specific editorial column necessities for compliance of a manuscript will always take over from directions in these general guidelines.

**To make a paper clear:** Adhere to recommended page limits.

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*Mistakes to avoid:*

- Insertion of a title at the foot of a page with subsequent text on the next page.
- Separating a table, chart, or figure—confine each to a single page.
- Submitting a manuscript with pages out of sequence.
- In every section of your document, use standard writing style, including articles ("a" and "the").
- Keep paying attention to the topic of the paper.
- Use paragraphs to split each significant point (excluding the abstract).
- Align the primary line of each section.
- Present your points in sound order.
- Use present tense to report well-accepted matters.
- Use past tense to describe specific results.
- Do not use familiar wording; don't address the reviewer directly. Don't use slang or superlatives.
- Avoid use of extra pictures—include only those figures essential to presenting results.

**Title page:**

Choose a revealing title. It should be short and include the name(s) and address(es) of all authors. It should not have acronyms or abbreviations or exceed two printed lines.

**Abstract:** This summary should be two hundred words or less. It should clearly and briefly explain the key findings reported in the manuscript and must have precise statistics. It should not have acronyms or abbreviations. It should be logical in itself. Do not cite references at this point.

An abstract is a brief, distinct paragraph summary of finished work or work in development. In a minute or less, a reviewer can be taught the foundation behind the study, common approaches to the problem, relevant results, and significant conclusions or new questions.

Write your summary when your paper is completed because how can you write the summary of anything which is not yet written? Wealth of terminology is very essential in abstract. Use comprehensive sentences, and do not sacrifice readability for brevity; you can maintain it succinctly by phrasing sentences so that they provide more than a lone rationale. The author can at this moment go straight to shortening the outcome. Sum up the study with the subsequent elements in any summary. Try to limit the initial two items to no more than one line each.

*Reason for writing the article—theory, overall issue, purpose.*

- Fundamental goal.
- To-the-point depiction of the research.
- Consequences, including definite statistics—if the consequences are quantitative in nature, account for this; results of any numerical analysis should be reported. Significant conclusions or questions that emerge from the research.

**Approach:**

- Single section and succinct.
- An outline of the job done is always written in past tense.
- Concentrate on shortening results—limit background information to a verdict or two.
- Exact spelling, clarity of sentences and phrases, and appropriate reporting of quantities (proper units, important statistics) are just as significant in an abstract as they are anywhere else.

**Introduction:**

The introduction should "introduce" the manuscript. The reviewer should be presented with sufficient background information to be capable of comprehending and calculating the purpose of your study without having to refer to other works. The basis for the study should be offered. Give the most important references, but avoid making a comprehensive appraisal of the topic. Describe the problem visibly. If the problem is not acknowledged in a logical, reasonable way, the reviewer will give no attention to your results. Speak in common terms about techniques used to explain the problem, if needed, but do not present any particulars about the protocols here.

*The following approach can create a valuable beginning:*

- Explain the value (significance) of the study.
- Defend the model—why did you employ this particular system or method? What is its compensation? Remark upon its appropriateness from an abstract point of view as well as pointing out sensible reasons for using it.
- Present a justification. State your particular theory(-ies) or aim(s), and describe the logic that led you to choose them.
- Briefly explain the study's tentative purpose and how it meets the declared objectives.

**Approach:**

Use past tense except for when referring to recognized facts. After all, the manuscript will be submitted after the entire job is done. Sort out your thoughts; manufacture one key point for every section. If you make the four points listed above, you will need at least four paragraphs. Present surrounding information only when it is necessary to support a situation. The reviewer does not desire to read everything you know about a topic. Shape the theory specifically—do not take a broad view.

As always, give awareness to spelling, simplicity, and correctness of sentences and phrases.

**Procedures (methods and materials):**

This part is supposed to be the easiest to carve if you have good skills. A soundly written procedures segment allows a capable scientist to replicate your results. Present precise information about your supplies. The suppliers and clarity of reagents can be helpful bits of information. Present methods in sequential order, but linked methodologies can be grouped as a segment. Be concise when relating the protocols. Attempt to give the least amount of information that would permit another capable scientist to replicate your outcome, but be cautious that vital information is integrated. The use of subheadings is suggested and ought to be synchronized with the results section.

When a technique is used that has been well-described in another section, mention the specific item describing the way, but draw the basic principle while stating the situation. The purpose is to show all particular resources and broad procedures so that another person may use some or all of the methods in one more study or referee the scientific value of your work. It is not to be a step-by-step report of the whole thing you did, nor is a methods section a set of orders.

**Materials:**

*Materials may be reported in part of a section or else they may be recognized along with your measures.*

**Methods:**

- Report the method and not the particulars of each process that engaged the same methodology.
- Describe the method entirely.
- To be succinct, present methods under headings dedicated to specific dealings or groups of measures.
- Simplify—detail how procedures were completed, not how they were performed on a particular day.
- If well-known procedures were used, account for the procedure by name, possibly with a reference, and that's all.

**Approach:**

It is embarrassing to use vigorous voice when documenting methods without using first person, which would focus the reviewer's interest on the researcher rather than the job. As a result, when writing up the methods, most authors use third person passive voice.

Use standard style in this and every other part of the paper—avoid familiar lists, and use full sentences.

**What to keep away from:**

- Resources and methods are not a set of information.
- Skip all descriptive information and surroundings—save it for the argument.
- Leave out information that is immaterial to a third party.

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**Results:**

The principle of a results segment is to present and demonstrate your conclusion. Create this part as entirely objective details of the outcome, and save all understanding for the discussion.

The page length of this segment is set by the sum and types of data to be reported. Use statistics and tables, if suitable, to present consequences most efficiently.

You must clearly differentiate material which would usually be incorporated in a study editorial from any unprocessed data or additional appendix matter that would not be available. In fact, such matters should not be submitted at all except if requested by the instructor.

**Content:**

- Sum up your conclusions in text and demonstrate them, if suitable, with figures and tables.
- In the manuscript, explain each of your consequences, and point the reader to remarks that are most appropriate.
- Present a background, such as by describing the question that was addressed by creation of an exacting study.
- Explain results of control experiments and give remarks that are not accessible in a prescribed figure or table, if appropriate.
- Examine your data, then prepare the analyzed (transformed) data in the form of a figure (graph), table, or manuscript.

**What to stay away from:**

- Do not discuss or infer your outcome, report surrounding information, or try to explain anything.
- Do not include raw data or intermediate calculations in a research manuscript.
- Do not present similar data more than once.
- A manuscript should complement any figures or tables, not duplicate information.
- Never confuse figures with tables—there is a difference.

**Approach:**

As always, use past tense when you submit your results, and put the whole thing in a reasonable order.

Put figures and tables, appropriately numbered, in order at the end of the report.

If you desire, you may place your figures and tables properly within the text of your results section.

**Figures and tables:**

If you put figures and tables at the end of some details, make certain that they are visibly distinguished from any attached appendix materials, such as raw facts. Whatever the position, each table must be titled, numbered one after the other, and include a heading. All figures and tables must be divided from the text.

**Discussion:**

The discussion is expected to be the trickiest segment to write. A lot of papers submitted to the journal are discarded based on problems with the discussion. There is no rule for how long an argument should be.

Position your understanding of the outcome visibly to lead the reviewer through your conclusions, and then finish the paper with a summing up of the implications of the study. The purpose here is to offer an understanding of your results and support all of your conclusions, using facts from your research and generally accepted information, if suitable. The implication of results should be fully described.

Infer your data in the conversation in suitable depth. This means that when you clarify an observable fact, you must explain mechanisms that may account for the observation. If your results vary from your prospect, make clear why that may have happened. If your results agree, then explain the theory that the proof supported. It is never suitable to just state that the data approved the prospect, and let it drop at that. Make a decision as to whether each premise is supported or discarded or if you cannot make a conclusion with assurance. Do not just dismiss a study or part of a study as "uncertain."

Research papers are not acknowledged if the work is imperfect. Draw what conclusions you can based upon the results that you have, and take care of the study as a finished work.

- You may propose future guidelines, such as how an experiment might be personalized to accomplish a new idea.
- Give details of all of your remarks as much as possible, focusing on mechanisms.
- Make a decision as to whether the tentative design sufficiently addressed the theory and whether or not it was correctly restricted. Try to present substitute explanations if they are sensible alternatives.
- One piece of research will not counter an overall question, so maintain the large picture in mind. Where do you go next? The best studies unlock new avenues of study. What questions remain?
- Recommendations for detailed papers will offer supplementary suggestions.

**Approach:**

When you refer to information, differentiate data generated by your own studies from other available information. Present work done by specific persons (including you) in past tense.

Describe generally acknowledged facts and main beliefs in present tense.

## The Administration Rules

Administration Rules to Be Strictly Followed before Submitting Your Research Paper to Global Journals Inc.

*Please read the following rules and regulations carefully before submitting your research paper to Global Journals Inc. to avoid rejection*.

*Segment draft and final research paper:* You have to strictly follow the template of a research paper, failing which your paper may get rejected. You are expected to write each part of the paper wholly on your own. The peer reviewers need to identify your own perspective of the concepts in your own terms. Please do not extract straight from any other source, and do not rephrase someone else's analysis. Do not allow anyone else to proofread your manuscript.

*Written material:* You may discuss this with your guides and key sources. Do not copy anyone else's paper, even if this is only imitation, otherwise it will be rejected on the grounds of plagiarism, which is illegal. Various methods to avoid plagiarism are strictly applied by us to every paper, and, if found guilty, you may be blacklisted, which could affect your career adversely. To guard yourself and others from possible illegal use, please do not permit anyone to use or even read your paper and file.

## Criterion for Grading a Research Paper (Compilation) by Global Journals

**Please note that following table is only a Grading of "Paper Compilation" and not on "Performed/Stated Research" whose grading solely depends on Individual Assigned Peer Reviewer and Editorial Board Member. These can be available only on request and after decision of Paper. This report will be the property of Global Journals**

| Topics | Grades | | |
|---|---|---|---|
| | **A-B** | **C-D** | **E-F** |
| ***Abstract*** | Clear and concise with appropriate content, Correct format. 200 words or below | Unclear summary and no specific data, Incorrect form<br><br>Above 200 words | No specific data with ambiguous information<br><br>Above 250 words |
| ***Introduction*** | Containing all background details with clear goal and appropriate details, flow specification, no grammar and spelling mistake, well organized sentence and paragraph, reference cited | Unclear and confusing data, appropriate format, grammar and spelling errors with unorganized matter | Out of place depth and content, hazy format |
| ***Methods and Procedures*** | Clear and to the point with well arranged paragraph, precision and accuracy of facts and figures, well organized subheads | Difficult to comprehend with embarrassed text, too much explanation but completed | Incorrect and unorganized structure with hazy meaning |
| ***Result*** | Well organized, Clear and specific, Correct units with precision, correct data, well structuring of paragraph, no grammar and spelling mistake | Complete and embarrassed text, difficult to comprehend | Irregular format with wrong facts and figures |
| ***Discussion*** | Well organized, meaningful specification, sound conclusion, logical and concise explanation, highly structured paragraph reference cited | Wordy, unclear conclusion, spurious | Conclusion is not cited, unorganized, difficult to comprehend |
| ***References*** | Complete and correct format, well organized | Beside the point, Incomplete | Wrong format and structuring |

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ISSN 975587

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