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# Practice of Remote Teaching and Students with Disabilities in the Covid-19 Pandemic: The Undeniable Right of Access to Education

By Ana Carolyna Cerqueira Alves, Thiago Correa Lacerda, Vanessa Do Carmo Correia  
& Pablo Velloso de Carvalho

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**Abstract-** The right to education is a fundamental and common guarantee for all and should not be violated due to the ineptitude of schools in assisting students with disabilities, who need to get to know their students and have a good interaction with their families, so that together can develop the best teaching strategies during the state of calamity, such as the period of the Sars-Cov-2 pandemic. Thus, the research aims to analyze the difficulties that students with disabilities (physical, visual, auditory, and intellectual) encountered in the practice of remote teaching during the pandemic period, in addition to discussing the protection of Inclusive Education in crisis scenarios., making an interface with the legislation to demonstrate the importance that the laws have to ensure the right to Education and the permanence of the student in school. The methodology adopted consisted of using the most celebrated research sources, such as doctrine, legislation, academic platforms, and computerized benefits.

**Keywords:** remote learning, right to education, covid- 19 pandemic, student with disabilities.

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# Practice of Remote Teaching and Students with Disabilities in the Covid-19 Pandemic: The Undeniable Right of Access to Education

Prática do Ensino Remoto e o Aluno Com Deficiência na Pandemia da Covid-19: O Inegável Direito de Acesso à Educação

Ana Carolyn Cerqueira Alves <sup>α</sup>, Thiago Correa Lacerda <sup>σ</sup>, Vanessa Do Carmo Correia <sup>ρ</sup>  
& Pablo Velloso de Carvalho <sup>ω</sup>

**Resumo-** O direito à Educação é uma garantia fundamental e comum a todos, não devendo ser violado por inépcia das escolas em atender o aluno com deficiência, as quais têm a necessidade de conhecer seu aluno e ter uma boa interação com a família desse, para que juntos possam desenvolver as melhores estratégias de ensino durante estado de calamidade, à exemplo o período da pandemia da Sars-Cov-2. Desse modo, a pesquisa tem por objetivo fazer uma análise das dificuldades que os alunos com deficiência (física, visual, auditiva e intelectual) encontraram na prática do ensino remoto durante o período pandêmico, além de discutir a proteção da Educação Inclusiva em cenários de crise, fazendo uma interface com a legislação para demonstrar a importância que as leis possuem para assegurar o direito à Educação e à permanência do aluno na escola. A metodologia adotada consistiu no uso das mais variadas fontes de pesquisa, à exemplo de doutrina, legislação, plataformas acadêmicas e subsídios informatizados. Após análise dos resultados, foi observado que não foi feito um planejamento adequado por parte das escolas para a adoção do ensino remoto, principalmente no que diz respeito àquele destinado ao público de pessoas com deficiência. Além disso, as leis não possuem verdadeira efetividade na prática, pois as escolas, professores e até mesmo os responsáveis têm dificuldade em seguir o que está exposto no ordenamento jurídico. Assim, além do direito à Educação ser violado no ensino remoto durante a crise pandêmica, também foi violado o direito à inclusão do aluno com deficiência em meio ao isolamento social, o que poderia ser uma oportunidade para rever metodologias e ampliar o acesso da pessoa com deficiência, pois a mobilidade reduzida é um fator que dificulta o transporte, mas se mostra um indicativo de negação ao direito já posto.

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**Palavras-chave:** ensino remoto, direito à educação, pandemia da covid-19, aluno com deficiência.

**Abstract-** The right to education is a fundamental and common guarantee for all and should not be violated due to the ineptitude of schools in assisting students with disabilities, who need to get to know their students and have a good interaction with their families, so that together can develop the best teaching strategies during the state of calamity, such as the period of the Sars-Cov-2 pandemic. Thus, the research aims to analyze the difficulties that students with disabilities (physical, visual, auditory, and intellectual) encountered in the practice of remote teaching during the pandemic period, in addition to discussing the protection of Inclusive Education in crisis scenarios., making an interface with the legislation to demonstrate the importance that the laws have to ensure the right to Education and the permanence of the student in school. The methodology adopted consisted of using the most celebrated research sources, such as doctrine, legislation, academic platforms, and computerized benefits. After analyzing the results, it was observed that there was no adequate planning by the schools for the adoption of remote teaching, especially with regard to the public of people with disabilities. In addition, laws do not have true obedience in practice, as schools, teachers and even those responsible have difficulty following what is exposed in the legal system. Thus, in addition to the right to education being violated in remote teaching during the pandemic crisis, the right to inclusion of students with disabilities during social isolation was also violated, which could be an opportunity to review methodologies and expand access for people with disabilities. disability, as reduced mobility is a factor that makes transport difficult, but it is an indication of denial of the already established right.

**Keywords:** remote learning, right to education, covid- 19 pandemic, student with disabilities.

## 1. INTRODUÇÃO

O mundo foi surpreendido por uma pandemia causada pelo vírus SARS-CoV-2, popularmente chamado de novo coronavírus, que foi inicialmente observado na cidade de Wuhan, China, e logo se tornou um problema em escala mundial por sua fácil transmissão. Em 26 de fevereiro de 2020, foi confirmado o primeiro caso da Covid-19, doença ocasionada pelo SARS-CoV-2, no Brasil e, a partir do mês de março do mesmo ano, todos puderam observar

o quanto as suas vidas mudaram completamente (WHO, 2020).

Com o intuito de evitar novas contaminações, medidas restritivas foram estabelecidas em todo território brasileiro, à exemplo do uso de máscaras, pontos para higienização das mãos em locais públicos, e o isolamento social, que em alguns casos foi elevado à condição de bloqueio, *lockdown*.

O chamado *lockdown* não impactou somente as relações sociais, mas também gerou reflexos na economia, trabalho e educação, a qual foi um dos setores mais afetados durante a pandemia: responsáveis, professores e alunos de todas as idades tiveram que se adaptar à nova situação. Dessa forma, foram adotadas normas educacionais excepcionais durante o estado de calamidade pública, conforme dispõe a Lei nº 14.040, de 18 de agosto de 2020, reconhecida pelo Decreto Legislativo nº 6, de 20 de março de 2020 (BRASIL, 2020).

Uma das medidas adotadas foi a aplicação do ensino remoto síncrono, que preconiza a transmissão em tempo real das aulas. O intuito é que o professor e os alunos tenham interações nos mesmos horários em que teriam presencialmente, ou seja, respeitando-se a grade de disciplinas, de modo que, a rotina escolar seja transposta para o ambiente virtual. O ensino remoto emergencial foi autorizado em caráter temporário pelo Ministério da Educação (MEC), por meio da Portaria nº 343, de 17 de março de 2020 para cumprir o cronograma presencial com as aulas online (ABMES, 2020).

Essa prática de ensino infelizmente não se mostrou isonômica durante esse período crítico, levando em consideração a situação financeira dos alunos e suas possíveis limitações durante o decurso da aprendizagem. Os estudantes advindos de instituições privadas já possuíam certos desafios, mesmo com o suporte de materiais didáticos e aulas síncronas. No entanto, a realidade das instituições públicas apontou um cenário ainda mais desafiador: a maioria dos alunos sequer possuem *notebook* ou computador, não têm acesso à internet (TOKAMIA, 2020) ou materiais impressos. Além disso, suas atividades eram aplicadas, majoritariamente, de forma assíncrona. Além dessa exclusão dos alunos com vulnerabilidades socioeconômicas, ainda há outra problemática: a invisibilidade dos alunos com deficiência durante essa crise sanitária, consoante ao que diz Jakubowicz (2020): “Toda barreira que um aluno com deficiência encontra na sala de aula, também encontra no ensino a distância”, o que nos leva ao questionamento: os alunos com deficiência foram atendidos de acordo com as suas limitações durante o ensino remoto emergencial?

Nota-se que a população ainda lidou com o ensino remoto somente como uma medida emergencial temporária, e por isso não há uma atenção à qualidade

no oferecimento do ensino. Cumpre destacar que essa modalidade não se confunde com a modalidade de Educação a Distância (EAD), conforme determina o art. 1 do Decreto nº 9.057:

Considera-se educação a distância a modalidade educacional na qual a mediação didático-pedagógica nos processos de ensino e aprendizagem ocorra com a utilização de meios e tecnologias de informação e comunicação, com pessoal qualificado, com políticas de acesso, com acompanhamento e avaliação compatíveis, entre outros, e desenvolva atividades educativas por estudantes e profissionais da educação que estejam em lugares e tempos diversos (BRASIL, 2017).

Já no ensino remoto, a aula ocorre em um tempo síncrono (seguindo os princípios do ensino presencial), com videoaula, aula expositiva por sistema de *web* conferência, e as atividades seguem durante a semana no espaço de um ambiente virtual de aprendizagem de forma assíncrona.

Cumpre ressaltar que os estudantes passaram por um processo de adaptação a essa nova realidade de ensino e por vezes enfrentaram diversos obstáculos, o que culminou ao risco de abandono dos estudos até que voltasse a modalidade presencial. Importante mencionar que as causas da evasão escolar são diversas, podendo ser de caráter socioeconômico, cultural, geográfico, didático, além de ser necessário levar em consideração as possíveis limitações dos alunos, sendo elas, por exemplo, de caráter físico, visual, auditivo ou intelectual. A seguir, definiremos, resumidamente, essas quatro necessidades específicas principais.

A deficiência intelectual é caracterizada pelo funcionamento cognitivo que não corresponde à média esperada, ou seja, abaixo do que é considerado normal. Segundo Honora e Frizanco:

A deficiência intelectual não é considerada uma doença ou um transtorno psiquiátrico, e sim um ou mais fatores que causam prejuízo das funções cognitivas que acompanham o desenvolvimento diferente do cérebro (HONORA; FRIZANCO, 2008, p. 103).

A deficiência visual é caracterizada como o comprometimento total ou parcial da capacidade de visão de um ou ambos os olhos. Esse tipo de deficiência pode ser causado de duas maneiras: congênita, ou adquirida.

Deficiência visual é uma categoria que inclui pessoas cegas e pessoas com visão reduzida. Na definição pedagógica, a pessoa é cega, mesmo possuindo visão subnormal, quando necessita da instrução em *braille*; a pessoa com visão subnormal pode ler tipos impressos ampliados ou com auxílio de potentes recursos ópticos (INSTITUTO BENJAMIN CONSTANT, 2002).

A Deficiência Auditiva consiste na perda parcial ou total da capacidade de detectar sons, causada por má-formação (causa genética), lesão na orelha ou na composição do aparelho auditivo.

Denomina-se deficiência auditiva a diminuição da capacidade de percepção normal dos sons, sendo considerado surdo o indivíduo cuja audição não é funcional na vida comum, e parcialmente surdo, aquele cuja audição, ainda que deficiente, é funcional com ou sem prótese auditiva (BRASIL, 1997, p. 310).

No que concerne à Deficiência Física, diz-se que são diferentes condições motoras que acometem as pessoas comprometendo a mobilidade, a coordenação motora geral e da fala, em consequência a lesões neurológicas, neuromusculares, ortopédicas, ou más formações congênitas ou adquiridas.

A deficiência física se refere ao comprometimento do aparelho locomotor que compreende o sistema Osteoarticular, o Sistema Muscular e o Sistema Nervoso. As doenças ou lesões que afetam quaisquer desses sistemas, isoladamente ou em conjunto, podem produzir grande limitações físicas de grau e gravidades variáveis, segundo os segmentos corporais afetados e o tipo de lesão ocorrida (BRASIL, 2006, p. 28).

Após esses conceitos, vimos o quanto adotar medidas para esses alunos é importante durante o curso do ensino. Sabe-se que as aulas remotas surgiram com o escopo de minimizar os impactos na aprendizagem dos estudantes advindos do sistema de ensino presencial e que a tecnologia permite interação entre a instituição e o aluno, mas nota-se que os grupos das Pessoas com Deficiência (PcD) não foram devidamente incluídos durante esse processo.

Por vezes os alunos com deficiência auditiva não tiveram um apoio de intérprete de libras; os alunos com deficiência visual não tinham condições de fazer uso de um *display braille* para o seu computador e os alunos com deficiência intelectual não conseguiam acompanhar o ritmo das atividades propostas. Além disso, houve a exclusão dos alunos que possuem vulnerabilidades sociais, haja vista a presente dicotomia no oferecimento do ensino remoto na rede pública e na rede privada, sendo os alunos de instituições públicas preteridos de um ensino de qualidade durante o período de pandemia.

Outra questão é em relação aos alunos com a mobilidade reduzida, que possuem redução efetiva da mobilidade, da flexibilidade, da coordenação motora ou da percepção. Cumpre destacar que essa mobilidade reduzida pode ser permanente ou temporária. Nesse caso, o ensino remoto já poderia ser uma boa alternativa para os alunos com deficiência que porventura tenham dificuldades de locomoção, pois devido às suas limitações, o transporte se torna um fator de dificuldade, de modo que, as metodologias deveriam ser revistas com o objetivo de ampliar o acesso da pessoa com deficiência ao ensino, de forma igualitária, ainda que esteja estudando em casa.

Nesse íterim, podemos citar outra modalidade de ensino não convencional que acentua a importância de analisar a situação do aluno e pensar sobre a metodologia mais adequada a ser aplicada: o ensino

hospitalar, que consiste em atender crianças com necessidades educacionais especiais transitórias, ou seja, crianças que por motivo de doença precisam de atendimento escolar diferenciado e especializado e configura um processo alternativo de educação, funcionando fora do ambiente físico escolar, mas que não deixa de assegurar o direito à educação ao aluno, oferecendo todo o suporte necessário em relação à sua limitação. A partir dessas questões, observamos o quanto é necessário pensarmos em novos métodos de ensino para corroborar com o quesito acessibilidade, para que o aluno tenha a oportunidade de ultrapassar barreiras e o processo de inclusão seja efetuado.

No sentido legal, é discutido o importante papel que a legislação possui para tutelar o Direito da educação ao aluno com deficiência durante o ensino remoto, revisitando leis que fazem parte do nosso ordenamento jurídico, que tem como escopo proteger o direito da pessoa com deficiência e a não discriminação. Além disso, é apresentada uma tabela com a exposição desses marcos normativos, correlacionando com o presente momento. Segundo Bobbio:

A existência de um direito, seja em sentido forte ou fraco, implica sempre a existência de um sistema normativo, onde por "existência" devem entender-se tanto o mero fator exterior de um direito histórico ou vigente quanto o reconhecimento de um conjunto de normas como guia da própria ação. A figura do direito tem como correlato a figura da obrigação (BOBBIO, 1992, p. 79-80).

Desse modo, o presente artigo aborda o tema da diversidade e inclusão escolar na modalidade remota, assim como as questões sobre os direitos à educação inclusiva e as violações existentes, principalmente em momentos de adversidades, tópicos relevantes na atualidade, uma vez que o oferecimento da educação durante o isolamento social por conta da pandemia da Covid-19 mostrou que o ensino não fora oferecido de forma igualitária, necessitando de um planejamento e estratégias para incluir a pessoa com deficiência por meio da utilização de materiais e plataformas que auxiliassem no processo de aprendizagem.

## II. O DIREITO E A EDUCAÇÃO INCLUSIVA

Um bom ponto de partida à nossa discussão são as perguntas: "o que é o Direito?" e "o que entendemos acerca do Direito?"

A palavra "Direito" se origina do latim "*directum*", que significa "em linha reta, o certo, o que está conforme a regra". Vem dos romanos antigos e consiste na soma das palavras "*DIS*" (muito) e "*RECTUM*" (reto, certo). Hoje, entende-se por Direito o conjunto de regras obrigatórias que garantem a convivência social e que regulam a conduta do homem na sociedade.



Na visão de Assane (2014, p. 27), recorda para o efeito, a definição concebida por Dante Alighieri sobre o Direito na Idade Média: "Direito é a proporção real e pessoal de homem para homem que, conservada, conserva a sociedade e que, destruída, a destrói". Na concepção de Hans Kelsen (2002), a definição de Direito é como: "um conjunto de regras que possui o tipo de unidade que entendemos por sistema". Cumpre destacar que essa é uma perspectiva positivista, pois defende a tese da norma posta como fonte única e primária do direito, sendo válido o que está descrito na lei em sua forma concreta.

É importante mencionar, ainda, que, em relação à natureza do Direito, são apresentadas duas correntes doutrinárias: a do Direito Natural e a do Direito Positivo.

A teoria Jusnaturalista (Direito Natural) apresenta a ideia de que o Direito é imutável, estável e permanente, sendo, assim, natural. É um Direito que tem validade em si mesmo, legitimado por uma ética superior, estabelecendo limites à própria norma estatal. Dessa forma, pontua Wolkmer:

O jusnaturalismo, que reivindica a existência de uma lei natural, eterna e imutável, distinta do sistema normativo fixado por um poder institucionalizado (Direito Positivo), engloba as mais amplas manifestações do idealismo que se traduzem na crença de um preceito superior advindo da vontade divina, da ordem natural das coisas, do instinto social, ou mesmo da consciência e da razão do homem (WOLKMER, 1989, p. 124).

A teoria positivista sinaliza que o seu sistema jurídico é um mecanismo completo e autossuficiente. Dessa forma:

O Direito é explicado pela sua própria materialidade coercitiva e concreta. Toda a sua validade e imputação fundamentam-se na própria existência de uma organização normativa e hierarquizada (WOLKMER, 1989, p. 127).

Mesmo sendo conceitos antagônicos, eles se complementam, pois o jusnaturalismo ainda exerce um papel no desenvolvimento da experiência jurídica e a doutrina juspositivista existe mesmo que o ideal de justo tenha passado por diversas transformações ao longo do tempo, tanto no âmbito social quanto político.

Ainda sobre o direito, também pode-se dizer que o Direito é um: "conjunto de normas de conduta social, imposto coercitivamente pelo Estado, para realização de segurança, segundo critérios de justiça". (NADER, 2003).

Tais conceitos imprimem muito bem a ideia do que representa o Direito, de assegurar a norma e regular as condições existenciais dos indivíduos e dos grupos sociais, e isso é o que buscamos em qualquer seara, principalmente no que versa sobre a educação inclusiva, tema central da presente discussão. Entende-se que o Direito regula e assegura o cumprimento de deveres e garantias, o que é de suma importância para todos, mas para as PcD's isso se torna ainda mais

significativo, levando-se em conta que, se não existissem determinadas leis, provavelmente muitas portas ainda estariam fechadas a esse público, que sofreu ao longo dos anos por terem as suas capacidades e potencialidades questionadas.

No entanto, sob uma perspectiva sociológica, Pierre Bourdieu (2010) mostra, em "O Poder Simbólico", que o Direito, antes de mostrar sua força, mostra-se dominante, seja em razão da sua simbologia, seja pela sua aparência de imparcialidade e conjunto de regras que costumam naturalizar os processos de dominação e de negação dos direitos das classes dominadas (PEREIRA; FARRANHA, 2017). O poder simbólico, de acordo com Bourdieu (1989, p. 7) é: "esse poder invisível o qual só pode ser exercido com a cumplicidade daqueles que não querem saber que lhe estão sujeitos ou mesmo que o exercem", ou seja, esse poder não se aparenta como um poder, e o indivíduo não tem a plena ciência que está sendo dominado.

Antes que as lutas de grupos minoritários pudessem angariar espaço e notoriedade social, percebe-se a existência desse poder simbólico, que era oculto e as classes dominantes exerciam certa dominação em relação aos grupos oprimidos, pois esse poder invisível era exercido na medida dos capitais simbólicos que se possuía. Tal poder era eivado de atitudes, gestos e padrões de conduta que produziam a dominação de uma classe, por meio da opressão, sobre outra, sob as perspectivas sociais, econômicas, de gênero, raça etc. E, como alguns grupos ainda não tinham iniciado sua trajetória rumo à conquista de políticas públicas, podemos interpretar que havia naturalidade com relação aos tópicos de poder e dominação.

Dessa forma, vemos o quanto a quebra de paradigmas é imprescindível para o avanço da sociedade, devendo-se ter em mente que, mesmo o direito tendo um papel importante em todos os campos, inclusive no da educação inclusiva, as questões de políticas públicas e sociais relativas à inclusão vão além de atos normativos. É preciso reconhecer a existência das desigualdades para que se chegue ao intuito de sanar tais situações, que são consideradas socialmente desfavoráveis, tanto para um indivíduo, quanto para o conjunto da população. Tais ações deveriam ter mais participação e interesse coletivo e não somente de quem porventura possua alguma limitação. Esse pensamento se alinha com o conceito de inclusão social imprimido por Sassaki:

Conceitua-se a Inclusão Social como o processo pelo qual a sociedade se adapta para poder incluir, em seus sistemas sociais gerais, pessoas com necessidades especiais e, simultaneamente, estas se preparam para assumir seus papéis na sociedade. A inclusão social constitui, então, um processo bilateral no qual as pessoas, ainda excluídas e a sociedade buscam, em parcerias, equacionar problemas, decidir sobre soluções e efetivar a



equiparação de oportunidades para todos (SASSAKI, 1997, p. 3).

Sendo assim, o ensino destinado a pessoas com deficiência é enxergado como algo positivo ao processo de inclusão e avanço social, pois todos os alunos têm a possibilidade de conhecer diferentes realidades e interagir enquanto aprendem, sendo motriz para a construção de um novo tipo de sociedade, conforme elucida Sassaki:

A inclusão social, portanto, é um processo que contribui para a construção de um novo tipo de sociedade através de transformações, pequenas e grandes, nos ambientes físicos, espaços internos e externos, equipamentos, aparelhos, utensílios mobiliário e meios de transportes e na mentalidade de todas as pessoas (SASSAKI, 1999, p. 42).

É válido também dirigir-se à questão do *Habitus*, teoria sistematizada por Bourdieu que surge da necessidade empírica de apreender as relações de afinidade entre o comportamento dos agentes e as estruturas e condicionamentos sociais, ou seja, é a internalização de valores que constituem a vida e a visão de mundo do indivíduo ou do grupo. De forma sucinta, trata-se de:

Um sistema de disposições duráveis e transponíveis que, integrando todas as experiências passadas, funciona a cada momento como uma matriz de percepções, de apreciações e de ações [...] (BOURDIEU, 1983, p. 65).

Apesar de possuir uma complexidade inerente, o termo *habitus* compreende a forma como a sociedade se coloca diante às pessoas, instituindo modos de ação e pensamento, sendo possível consolidar no momento presente experiências do passado. Desse modo, é a partir do processo de socialização que o *habitus* ocorre e é por via dele que surge uma incorporação social de maneira mais segura, porém sem caráter definitivo.

### III. LEGISLAÇÃO, ENSINO DURANTE A PANDEMIA E OS IMPACTOS À EDUCAÇÃO BRASILEIRA INCLUSIVA

De acordo com a Constituição Federal de 1988 (BRASIL, 1988), a educação é um direito fundamental e deve ser garantido a todos. No entanto, lidamos com várias problemáticas no que diz respeito a esse tema. O ensino educacional brasileiro recebe críticas plausíveis em relação a sua qualidade. Além de apresentar desafios de entrada e finalização da escola por parte de crianças e jovens de todo o Brasil, existem questões a serem discutidas em relação à promoção da diversidade e inclusão no oferecimento de ensino para PcD, e de como lidar com as novas perspectivas de aprendizagem alinhadas às mudanças do mundo e a necessidade das novas gerações. Segundo John Locke, consoante a indicação de Oliveira:

[...] o caminho que leva à construção desta sociedade implica um processo gigantesco de educação, e não apenas a educação entendida no sentido da transmissão

do conhecimento, mas no sentido da formação da cidadania (OLIVEIRA, 2000, p. 181).

A educação não pode ser negada a nenhum cidadão brasileiro. Mesmo em difíceis circunstâncias, é dever do estado e da família assegurar esse direito, visando o pleno desenvolvimento da pessoa e seu preparo para o exercício da cidadania, conforme dispõe o art. 205, da Constituição Federal (BRASIL, 1988). Deve haver igualdade e equidade para a promoção do ensino e, respeitando-se os princípios que o norteiam. Segundo Stuart Mill:

[...] a educação, portanto, é uma dessas coisas que é admissível, em princípio, ao governo ter de proporcionar ao povo. Trata-se de um caso ao qual não se aplicam necessária e universalmente as razões do princípio da não-interferência [...] é, pois, um exercício legítimo dos poderes do governo impor aos pais a obrigação legal de dar instrução elementar aos filhos (MILL, 1983, p. 404).

Como já citado, a educação é um direito fundamental e de natureza social, conforme dispõe o art. 6 da Constituição Federal:

São direitos sociais a educação, a saúde, a alimentação, o trabalho, a moradia, o transporte, o lazer, a segurança, a previdência social, a proteção à maternidade e à infância, a assistência aos desamparados, na forma desta Constituição (BRASIL, 1988, art. 6).

Sendo esse indispensável sob pena de ferir o princípio da dignidade humana, nesse ínterim posiciona-se Pelegrini:

O princípio da dignidade da pessoa humana surge como uma conquista em determinado momento histórico. Trata-se de tutelar o indivíduo possibilitando-lhe uma existência digna, aniquilando os ataques tão frequentes à sua dignidade (PELEGRINI, 2004, p. 05).

Por ser um direito essencial aos indivíduos, além da Constituição, a educação é tutelada também pela Lei de Diretrizes e Bases da Educação (LDB), de 1996, que foi criada para garantir o direito a toda população ao acesso à educação gratuita e de qualidade, além de tratados internacionais, incorporados ao ordenamento jurídico brasileiro, como o Pacto Internacional de Direitos Econômicos, Sociais e Culturais, de 1966, que abrange o Direito à Educação e, a Convenção sobre os Direitos da Criança, de 1989, em que os Estados-partes reconhecem que toda criança tem o direito inerente à vida, assim como a educação.

Além disso, com base na Lei Federal nº 8.069, de 1990 (BRASIL, 1990), que é o Estatuto da Criança e do Adolescente (ECA), devem ser aplicadas medidas que visem a proteção dos direitos de menores de idade, inclusive a matrícula e frequência obrigatória em estabelecimento oficial de ensino fundamental (BRASIL, 1990, art. 101, III). De acordo com o ECA (BRASIL, 1990, art. 53): "a criança e adolescente têm direito à educação, visando ao pleno desenvolvimento de sua pessoa, preparo para o exercício da cidadania e qualificação para o trabalho". Dessa forma, a Lei

assegura tanto a igualdade de condições para o acesso e permanência na escola.

O Estado democrático de Direito resguarda o direito de educação para todos, mas infelizmente as pessoas com deficiência ainda enfrentam dificuldades em relação à inclusão durante o ensino. A educação inclusiva jamais deve ser deixada de lado e é de suma importância para atender PcD's de forma digna e isonômica, respeitando suas eventuais dificuldades e limitações. Trata-se também de um direito garantido pela Lei Brasileira de Inclusão (LBI), de nº 13.146/2015 (BRASIL, 2015), e a Convenção sobre os Direitos da Pessoa com Deficiência da Organização das Nações Unidas (ONU), conforme determina em seu art. 27:

Art. 27 A educação constitui direito da pessoa com deficiência, assegurados sistema educacional inclusivo em todos os níveis e aprendizado ao longo de toda a vida, de forma a alcançar o máximo desenvolvimento possível de seus talentos e habilidades físicas, sensoriais, intelectuais e sociais, segundo suas características, interesses e necessidades de aprendizagem (BRASIL, 2015, art. 27).

A Lei visa tutelar os direitos das PcD's em vários aspectos, mas no que tange à educação, preconiza que nas escolas inclusivas é indispensável que o conteúdo e as aulas sejam oferecidos em Libras, como primeira língua, e em português, na modalidade escrita, para os alunos surdos. A adoção de medidas individuais e coletivas que proporcionem o desenvolvimento acadêmico e a socialização dos alunos com deficiência valem para as escolas e classes bilíngues e para os materiais de aula. Isso facilita a integração e, conseqüentemente, o aprendizado; além da oferta de aulas e materiais inclusivos (em Libras e *Braille*), as práticas pedagógicas também precisam ser incorporadas e preferidas pela instituição que tiver alunos com deficiência matriculados, a qual também deve ofertar tecnologias assistivas que ampliem as habilidades dos estudantes nas escolas e favoreçam sua permanência.

Mesmo com a lei vigente, as questões levantadas são: será que a inclusão do aluno com deficiência foi feita também durante o ensino remoto emergencial? As suas limitações foram respeitadas e o Direito aos estudos não foi preterido?

Ficamos diante de uma crise sanitária que impactou a saúde, a economia e a educação do país. Meses em que as atividades corriqueiras já não eram executadas como antes. Em relação ao ensino, as escolas tiveram que se adaptar às pressas para oferecer o ensino em caráter emergencial por conta da pandemia da Covid-19. No entanto, a realidade é que a inclusão da criança e do jovem com deficiência já não ocorria como deveria no setor educacional. De acordo com Maciel:

Nos últimos anos, ações isoladas de educadores e de pais têm promovido e implementado a inclusão, nas escolas, de pessoas com algum tipo de deficiência ou necessidade

especial, visando resgatar o respeito humano e a dignidade, no sentido de possibilitar o pleno desenvolvimento e o acesso a todos os recursos da sociedade por parte desse segmento (MACIEL, 2020).

Essas ações isoladas não são suficientes para o efetivo processo de inclusão, pois trata-se de um trabalho conjunto feito com a participação dos responsáveis, professores e da gestão escolar. Neste sentido, muitas escolas não souberam como acolher os alunos com possíveis limitações e integrá-los aos conteúdos aplicados regularmente em suas respectivas turmas no modelo remoto. Em alguns casos, o aluno foi totalmente excluído de atividades propostas e, em outras situações, a escola aplicou uma tarefa sem se atentar à questão da adaptação para as dificuldades do aluno, tornando o estudo maçante e sem aproveitamento.

De acordo com o MEC:

As adaptações curriculares são: respostas educativas que devem ser dadas pelo sistema educacional, de forma a favorecer a todos os alunos e dentre estes, os que apresentam necessidades educacionais especiais: a) de acesso ao currículo; b) de participação integral, efetiva e bem-sucedida em uma programação escolar tão comum quanto possível (BRASIL, 2000, p. 7).

Sendo assim, é de grande importância traçar um estudo voltado para a Educação Inclusiva correlacionando com matéria legislativa, uma vez que o direito do aluno com deficiência deve ser resguardado em qualquer situação. Nesse sentido, é válido discorrer sobre o Estatuto da Pessoa com Deficiência (EPD) (BRASIL, 2015), que entrou em vigor no dia 02 de janeiro de 2016, trazendo significativas mudanças, inclusive no que se refere a questões de matéria cível. Uma das principais mudanças foi a respeito do Novo Regime das Incapacidades, que acarretou a revogação dos incisos do art. 3 do Código Civil e seu *caput*, além de ter modificado os incisos II e III, art. 4, do Código Civil, sendo afastada a teoria de que há relação entre a deficiência (física, mental, intelectual) e a incapacidade para os atos da vida civil. Atualmente, no ordenamento jurídico, são absolutamente incapazes apenas as pessoas menores de 16 (dezesseis) anos, não podendo uma pessoa com qualquer tipo de deficiência ser considerada absolutamente incapaz para os fins do presente Código, pois a deficiência não é motivo que configura a incapacidade jurídica de uma pessoa.

Os relativamente incapazes são as pessoas entre 16 (dezesseis) e 18 (dezoito) anos, os ébrios habituais, os pródigos, os viciados em tóxicos e, aqueles que, por causa transitória ou permanente, não puderem exprimir sua vontade. Cumpre registrar que se a pessoa com deficiência não conseguir externar a sua vontade o regime considerado será de incapacidade relativa, porém nessa situação a incapacidade advém da impossibilidade de manifestação de vontade e não por conta da deficiência do indivíduo. Sem dúvidas, a

LBi, também conhecida como EPD (BRASIL, 2015), apresenta maior sentido de igualdade com suas modificações, além de significativa contribuição ao Código Civil de 2002, em seu capítulo IV. A Lei versa sobre o acesso à Educação e traz avanços, tais como a proibição da cobrança, pelas escolas, de valores adicionais pela implementação de recursos de acessibilidade e frisa que o sistema educacional deve ser inclusivo em todos os níveis.

Mesmo que na lei esteja expressa a questão da inclusão no âmbito da educação, muitas vezes essa não ocorre como deveria. Não é despendendo lembrar que configura ilícito civil a violação do direito à inclusão, sendo esse também defeso pela Constituição Federal (BRASIL, 1988). Há, inclusive, responsabilização civil no caso de descumprimento das obrigações estipuladas que ocasionem danos existenciais e eventualmente patrimoniais e prejudiquem de alguma forma o processo de inclusão do aluno com deficiência, seja ele pertencente a rede pública ou privada. No que tange à responsabilidade civil, o conceito nas palavras de Plácido e Silva é:

Dever jurídico, em que se coloca a pessoa, seja em virtude de contrato, seja em face de fato ou omissão, que lhe seja imputado, para satisfazer a prestação convencionada ou para suportar as sanções legais, que lhe são impostas. Onde quer, portanto, que haja obrigação de fazer, dar ou não fazer alguma coisa, de ressarcir danos, de suportar sanções legais ou penalidades, há a responsabilidade, em virtude da qual se exige a satisfação ou o cumprimento da obrigação ou da sanção (PLÁCIDO; SILVA, 2010, p. 642).

Cumpra mencionar que a responsabilidade civil pode ser subjetiva (*lato sensu*) ou seja, causada por conduta culposa. Já a culpa objetiva (*stricto sensu*) caracteriza-se quando o agente causador do dano pratica o ato com negligência ou imprudência. Já o dolo condiz com a vontade de se obter o resultado ilícito. No caso da conduta comissiva ou omissiva em relação à inclusão da pessoa com deficiência na educação, a responsabilidade civil caracteriza-se como objetiva. Nesse ínterim, Orlando Gomes pontua:

Realmente, apesar da multiplicação dos casos submetidos ao princípio da responsabilidade objetiva, permanece, como regra geral, o preceito que condiciona a obrigação de reparar o dano à culpa do agente. Não foi arredado sem embargo da adoção de processos técnicos que elastecem consideravelmente sua aplicação. Nem é possível a substituição pelo risco, porque esta ideia não comporta a mesma generalização. Ainda que se multipliquem as situações nas quais a obrigação de indenizar seja imposta independentemente da culpa, a solução continuará com o caráter de exceção que possui atualmente. É que a ideia de culpa não pode ser dissociada do conceito de delito. Afora, pois, os casos especificados em lei, nos quais o dever de reparar está previsto e determinado com abstração da conduta do obrigado, a responsabilidade há de resultar de investigação dessa conduta para a verificação de sua anormalidade. Sempre que se quiser atribuir esse dever sem esse pressuposto, há necessidade de especificá-lo na

lei. Assim, a questão teria solução extremamente casuística, se porventura se viesse a suprimir a fonte genérica e abstrata da responsabilidade, que é a culpa (GOMES, 1995, p. 282).

Dessa forma, destaca-se que, para existir o dever de indenizar, a responsabilidade civil objetiva necessita de elementos essenciais, tais como a comprovação do dano e do nexo causal.

No que tange às escolas, percebe-se que essa forma de não saber agir por parte delas durante o isolamento social, mostra que não houve uma estratégia de inclusão à pessoa com deficiência. A invisibilidade desses alunos é notória a partir do momento em que um planejamento emergencial foi aplicado sem que o quesito diversidade fosse considerado no âmbito escolar. O ensino remoto já é uma realidade no Brasil, e as escolas precisam se adequar a esse método de aprendizagem o quanto antes, pois enrijecer os processos e não inovar dificulta o ensino em um mundo que passa por modernizações cada vez mais rápidas.

É importante salientar que não é o aluno que tem que se adequar às propostas de ensino aplicadas pela escola, a escola que tem o dever de moldar a realidade de aprendizado do aluno. Desse modo, destaca Sassaki:

[...] esse paradigma é o da inclusão social - as escolas (tanto comuns como especial) precisam ser reestruturadas para acolherem todo espectro da diversidade humana representado pelo alunado em potencial, ou seja, pessoas com deficiências físicas, mentais, sensoriais ou múltiplas e com qualquer grau de severidade dessas deficiências, pessoas sem deficiências e pessoas com outras características atípicas etc. É o sistema educacional adaptando-se às necessidades de seus alunos (escolas inclusivas), mais do que os alunos adaptando-se ao sistema educacional (escolas integradas) (SASSAKI, 1998, p. 9).

Uma crise não pode ser usada como justificativa para afastar o aluno com deficiência de forma arbitrária: ele deve ser estimulado a participar das mesmas atividades que os colegas de classe participam, levando-se em conta suas dificuldades e auxiliando-o. A escola também deve proporcionar o suporte adequado às aulas sem cobrar quaisquer custos adicionais, além de oferecer o recurso de plataformas acessíveis.

É necessário que a escola conheça o seu aluno, tenha uma boa interação com sua família para que possam desenvolver as melhores estratégias de ensino, de modo a incluir a criança ou o jovem com deficiência.

Traçar esse estudo é significativo, pois garantir que esses estudantes permaneçam e se desenvolvam na escola tem sido desafiador, no entanto, para ocorrer a implementação do método de ensino inclusivo remoto, é necessário ter em mente que se trata de um processo gradativo e detalhado, sendo cruciais ações



concernentes à gestão escolar, ao planejamento pedagógico e às políticas públicas e apoio familiar.

O MEC validou a resolução do Conselho Nacional de Educação, que autorizou o ensino remoto nas escolas públicas e particulares do país enquanto durasse a pandemia da covid-19.

De acordo com a Resolução (BRASIL, 2020): "as atividades pedagógicas não presenciais [...] poderão ser utilizadas em caráter excepcional, para integralização da carga horária das atividades pedagógicas" quando houver "suspensão das atividades letivas presenciais por determinação das autoridades locais" e "condições sanitárias locais que tragam riscos à segurança". Ademais, a resolução regulamentou a Lei nº 14.040 e recomendou não haver reprovação no ano de 2020. O texto sinaliza que as escolas devem:

Garantir critérios e mecanismos de avaliação ao final do ano letivo de 2020, considerando os objetivos de aprendizagem, efetivamente cumpridos pelas escolas e redes de ensino, de modo a evitar o aumento de reprovação e do abandono escolar (BRASIL, 2020).

Mesmo que um dos objetivos fosse o não abandono ao ensino, por que os alunos com deficiência já se sentiam abandonados por esse sistema? A pergunta é respondida a partir do momento que é verificado que não havia inclusão para esse aluno durante o isolamento social. As circunstâncias de ensino já eram conflitantes para o aluno que não possuía uma limitação aparente, contudo o quadro se tornou mais complexo quando o estudante com deficiência auditiva não tinha o suporte de um intérprete de libras e/ou aquele com deficiência visual não tinha ferramentas tecnológicas aptas para auxiliá-lo durante o estudo.

#### IV. METODOLOGIA

Para a construção metodológica desta pesquisa, realizada no ano de 2021, fez-se importante identificar e compreender os desafios que envolviam a relação entre a legislação e a aplicação do ensino remoto em cenário de pandemia. Dessa forma, foram utilizadas as mais variadas fontes de pesquisa documental, tais como: doutrina, legislação, portarias e subsídios informatizados (notícias em geral), no período de 2020-2021, ano em que a temática da pandemia ganhou destaque, e trabalhos acadêmicos discorrendo sobre seus impactos. A busca também foi realizada por meio da base de dados *SciELO* e *Google School*, a fim de localizar artigos e publicações sobre o tema. Os descritores utilizados foram: ensino remoto, pandemia, Covid-19, Direito e educação, alunos com deficiência.

Uma análise qualitativa direto com o público-alvo está em andamento, para isso, o projeto, condizente com Resolução do Conselho Nacional de Saúde, foi aprovado pelo Comitê de Ética em Pesquisa sob o número CAAE: 49075221.0.0000.816. Após a entrega do Termo de Consentimento Livre e Esclarecido (TCLE), assinados pelos participantes, a coleta é realizada nas salas de aula e de recursos multifuncionais ou em encontros virtuais por vide chamadas em horário combinado previamente. Essa pesquisa gerará futuras publicações no sentido de complementar o presente trabalho. Além disso, foram coletadas as leis pertinentes à educação e inclusão, foi iniciada uma leitura exploratória com a finalidade de discorrer sobre as dificuldades e possíveis soluções para que os alunos com deficiência não fossem preteridos arbitrariamente do processo de aprendizagem na modalidade de ensino remoto.

*Tabela 1:* Principais marcos normativos.

LEI	ABORDAGEM	QUESTÃO
Lei nº 8.069/1990	Estatuto da Criança e do Adolescente (ECA)	Quais os impactos que a Pandemia de Covid-19 gerou para a aplicação do ECA?
Lei nº 9.394/1996	Lei de Diretrizes e Bases da Educação Nacional (LDB)	O que dizia a LDB em tempos de pandemia?
Lei nº 10.436/2002	A Língua Brasileira de Sinais é reconhecida como uma língua nacional	Durante o ensino remoto na pandemia, todas as escolas tinham intérpretes de Libras para auxiliar os alunos surdos?
Lei nº 13.146/2015	Lei Brasileira de Inclusão (LBI), também conhecida como Estatuto da Pessoa com Deficiência (EPD)	Quais foram os desafios para a inclusão durante a crise pandêmica?
Lei nº 14.040/2020	Estabelece normas educacionais excepcionais a serem adotadas durante o estado de calamidade pública	Quais foram as medidas adotadas?

São apresentadas no quadro as principais Leis que versam ou impactaram de alguma forma a Educação Inclusiva do país, as quais têm o papel de proteger e deixar defeso em lei que não há distinção

quanto à promoção de ensino. Contudo, vale lembrar que atravessamos um período pandêmico, e na prática houve muita dificuldade em concretizar a matéria legislativa. Dessa forma, foram abordadas questões



para reflexão e posterior análise de como essas medidas tiveram aplicação, levando-se em consideração o contexto de crise sanitária e o planejamento emergencial adotado.

## V. RESULTADOS

Acerca das questões contidas no quadro, podemos identificar, através das respostas, quais são as problemáticas que se referem ao tema de ensino remoto durante a pandemia e como as legislações se relacionam.

Na primeira pergunta, questiona-se quais foram os impactos que a Pandemia da Covid-19 gerou para a aplicação do ECA. À luz desse Estatuto, é prevista a garantia de educação para todos, de modo que nos deparamos com o primeiro impacto, que foi a falta de educação igualitária, haja vista que muitos não tinham acesso à internet ou computador para acessar os materiais disponibilizados. Esse primeiro impacto acarretou o segundo, que foi a desistência dos alunos em continuar pertencendo ao quadro escolar.

Nesse sentido, vamos à outra questão, que diz respeito ao que a LDB (BRASIL, 2015). A referida Lei, no seu art. 80, deixa claro que os governos devem promover o EAD quando diz que o Poder Público tem o papel de incentivar o desenvolvimento e a veiculação de programas de ensino a distância, em todos os níveis e modalidades de ensino, e de educação continuada. Contudo, observando-se que a educação não chegou de forma igualitária, é notório que a posição da lei na prática não é efetiva.

Quando pensamos no aluno com deficiência, a situação se torna mais delicada quanto à efetivação de seus direitos. A exemplo dos alunos surdos e a Lei nº 10.436/2002 (BRASIL, 2002), que reconheceu a Língua Brasileira de Sinais como uma língua nacional: será que em todas as classes de ensino remoto foram colocados intérpretes de libras para auxiliar a comunicação com esses alunos? A resposta, infelizmente, é negativa, em que pese os alunos surdos precisarem ser acompanhados com o auxílio do intérprete da Língua de Sinais, profissional fluente na língua falada/sinalizada do seu país, qualificado para desenvolver essa função

(BARBOSA-JUNIOR, 2011), a realidade brasileira em classe regular de ensino já não ocorria desta forma, sendo assim, em momento de pandemia teve uma implementação ainda mais problemática, sendo esse um dos principais desafios enfrentados pela LBI (BRASIL, 2015), a efetividade do processo de inclusão das PcD's não só nas classes de ensino remoto, mas no novo contexto social de crise.

Por fim, tivemos a publicação da Lei nº 14.040 (BRASIL, 2020), que dispõe sobre as normas educacionais excepcionais a serem adotadas durante o estado de calamidade pública, que determinou a normatização da reorganização do calendário escolar do ano letivo afetado pelo estado de calamidade PÚBLICA de todos os níveis, etapas e modalidades de educação e ensino. Além disso, determinou o planejamento e a reorganização dos ambientes de aprendizagem, comportando tecnologias disponíveis para o atendimento do disposto nos currículos, tais como: realizar atividades *on-line* síncronas e assíncronas de acordo com a disponibilidade tecnológica; realizar atividades de avaliação *on-line* ou por meio de material impresso entregue desde o período de suspensão das aulas; utilizar mídias sociais de longo alcance (*WhatsApp, Facebook, Instagram* etc.) para estimular e orientar os estudos, pesquisas e projetos que podem ser computados no calendário e integrar o replanejamento curricular.

Após a análise das questões, foi constatado que, mesmo sendo estabelecido em lei, novas medidas para aplicação do ensino, devemos ter em mente a situação do aluno que possui algum tipo de limitação e, conseqüentemente, dificuldades em se adaptar, sendo de suma importância a efetivação das leis para tutelar os direitos e as garantias que versam sobre a educação.

No que concerne à etapa para levantamento de dados, foram identificados oito artigos publicados durante os anos de 2020 e 2021 contemplando questões de ensino, inclusão e a pandemia da Covid-19. Segue uma breve descrição por autoria e respectivas plataformas, na Tabela 2, descrito a seguir:

*Tabela 2:* Artigos localizados na busca *on-line*.

Título/Autores/Revista	Plataforma	Objetivo	Resultados
A Educação dos Estudantes com Deficiência em Tempos de Pandemia de Covid-19 A Invisibilidade dos Invisíveis - Revista Interações Neta et al. (2020)	Google School	Compreender como tem acontecido o ensino remoto para os alunos com deficiência em escolas da rede municipal de ensino de Fortaleza.	Evidencia que as problemáticas vivenciadas na inclusão de estudantes com deficiência na escola comum permaneceram e ampliaram-se durante o ensino remoto ofertado no período de pandemia da Covid-19.
Tempos de Pandemia: Reflexões sobre a escola, os sujeitos e suas diferentes necessidades - <i>Brazilian Journal of Development</i> Canal e Rozek (2020)	Google School	Identificar os desafios impostos pela Pandemia à comunidade escolar e ao público-alvo da Educação Especial.	Concluiu que há necessidade de mudanças na formação inicial e continuada de professores na perspectiva da Educação Inclusiva.

Educação Especial e Inclusiva em tempos de pandemia: o lugar de escola e as condições do ensino remoto emergencial - Práxis Educativa Souza e Dainez (2020)	Google School	Análise das condições de realização do ensino remoto emergencial direcionado a um aluno com Transtorno do Espectro do Autismo.	Aponta para o papel da escola como espaço coletivo de resistência político-pedagógica e de mediação nos processos de humanização.
Pessoas com deficiência em tempos de pandemia da COVID-19: algumas reflexões - Revista Educação Especial Orlando <i>et al.</i> (2021)	Google School	Problematizar as condições de vida da população brasileira, principalmente das pessoas com deficiência, frente à pandemia e ao impacto na sua escolarização.	Considera que o processo de ingresso no ensino fundamental requer um trabalho em conjunto com os familiares e professores, para construção do vínculo, além da necessidade de garantir espaços de escuta e fala – tanto para os professores, quanto para as famílias.
A exclusão e seus desdobramentos oriundos de uma pandemia: reflexões para a construção de uma escola inclusiva - Revista artes de educar. Redig e Mascaro (2020)	Google School	Refletir a partir de relatos de jovens com transtorno do espectro autista sobre como vivenciam e lidam com a escola em momentos de isolamento.	Constata-se a ausência de suportes adequados para os professores, no momento de isolamento social, para atender aos estudantes com deficiência e pontua a dificuldade de inclusão no período de pandemia, que desvela a situação de exclusão já vivenciada pelo PcD.
Práticas de ensino em tempos de pandemia de Covid-19: é possível a inclusão das pessoas com deficiência? Revista teias Schwamberger e Santos (2021)	Google School	Analisar as práticas de ensino das redes públicas de ensino fundamental e médio localizadas nas periferias da cidade de São Paulo e das redes da Região Metropolitana de Buenos Aires, voltadas especificamente para educação de pessoas com deficiência.	Aborda que as particularidades oferecidas pelos contextos da Covid-19 e do confinamento requerem estudos que aprofundem o olhar sobre os cotidianos, pois a reconfiguração das práticas de ensino remoto reflete as dívidas e as promessas que os países prometeram para eliminar a exclusão digital e dentro das escolas.
Educação e pandemia: outras ou refinadas formas de exclusão - Scienceopen.com Assis (2021)	Scielo	Problematizar discursos proferidos por professores e estudantes no âmbito dos órgãos de gestão democrática educacionais públicos, enfatizando aspectos excludentes que tendem a destacar perspectivas de inovação, proatividade e/ou sucesso.	Indicam que uma parcela significativa dos estudantes está entre esses bolsões de exclusão: não tem acesso à <i>internet</i> em suas casas; não tem computadores; tem celulares, mas com pacotes baratos que não permitem assistir a todas as aulas da semana via <i>streaming</i> .
Invisibilidade sistemática: pessoas com deficiência e Covid-19 no Brasil - Interface Pereira <i>et al.</i> (2021)	Scielo	São traçados cinco pontos de análise quanto à vulnerabilidade das PcD, com propostas de ações de enfrentamento e mitigação das consequências da Covid-19.	Aponta que as consequências da pandemia não poderão apenas ser mensuradas pelos grandes sistemas de informação. É necessário investir em pesquisas qualitativas para compreender as mudanças que a Covid-19 trouxe para a vida das PcD e suas famílias.

Nossa pesquisa documental também verificou notícias *on-line*.

Ainda na análise da Educação Inclusiva, precisamos abordar a limitação tecnológica apresentada pelas famílias de baixa renda, como retrata o Informe ENSP (2020) em uma fala frustrada de uma colaboradora de uma creche na comunidade da Rocinha: “Eu fiz um planejamento que, na minha mente, daria muito certo, mas uma mãe me mandou mensagem falando: ‘Simone, estou desde às 13h da tarde tentando, já são 18h e minha filha não conseguiu fazer nada’”. Mesmo diante de todos os desafios do ensino remoto durante a pandemia, conseguimos identificar relatos de sucesso, ou de continuidade,

como menciona Costa, Souza e Pereira (2021), que concluíram em seu estudo que a articulação do professor do Atendimento Educacional Especializado com a comunidade escolar tornou possível manter os atendimentos no formato remoto.

Em relação ao direito à educação inclusiva, é perceptível o conhecimento de que o ensino não foi oferecido de forma igualitária. Nesse sentido, bem pontuou a formadora do Instituto Rodrigo Mendes à Educação Integral (JAKUBOWICZ, 2020): “Entendemos as dificuldades, mas esse atendimento tem que ser mantido, porque não é uma benesse, é um direito e é uma prioridade”. Além de especialistas, pais de alunos com deficiência se veem consternados pela constante

luta de seus filhos para terem acesso ao direito básico da educação.

A mãe de uma aluna com paralisia cerebral afirmou: “É muita cobrança, tristeza, angústia, necessidade de acolhimento”. À Carta Capital (BASILIO, 2021), ainda relatou que a sua filha permaneceu fora da escola por falta de propostas pedagógicas e negativas de matrícula, sendo esse crime previsto em lei, pois configura a omissão por parte dos estados na oferta da educação inclusiva.

Deve-se ter em mente que o ensino remoto foi proposto com a prerrogativa de tentar minimizar os efeitos do isolamento social e não de preterir o aluno ao ensino, o que, além de ferir o ordenamento jurídico, acarreta também no desgaste psicológico, pois os responsáveis se veem no papel da busca pela tutela de direitos e, por vezes, atuam como educadores dentro de suas casas devido à falta de auxílio.

No que tange às escolas e profissionais da educação, é oportuno salientar que, com a chegada da pandemia, não foram pensadas estratégias de inclusão ao aluno com deficiência, o que torna a invisibilidade desses estudantes perceptível, haja vista que um planejamento emergencial foi aplicado, mas sem pensar nas estratégias de cunho relevante para o indivíduo que possui deficiência física, intelectual, visual ou auditiva, por exemplo. O professor também é o mentor do processo educacional e juntamente à escola precisa se adequar ao novo tempo e às diretrizes de ensino, estimulando diariamente o aluno, mesmo que de forma não presencial, cooperando com as suas necessidades. A sua prática pedagógica é um fator de suma importância e influenciadora para o sucesso e/ou insucesso do discente com deficiência, como determina Vitta:

Para que o processo de inclusão ocorra, há necessidade da existência de uma coerência entre a maneira de ser e de ensinar do professor, além da sensibilidade à diversidade da classe e da crença de que há um potencial a explorar. A predisposição dos professores em relação à integração dos alunos com problemas de aprendizagem, especialmente se estes problemas forem graves e tenham caráter permanente, é um fator extremamente condicionante dos resultados obtidos. Por isso, uma atitude positiva já constitui um primeiro passo importante, que facilita a educação destes alunos na escola integradora (VITTA *et al.*, 2010, p. 425).

É observado que o ordenamento jurídico brasileiro possui legislações acerca da educação e da inclusão, no entanto, a prática se mostra adversa, pois os alunos que são PcD's foram excluídos do processo de ensino durante a pandemia da Covid-19. Inclusive, alguns responsáveis já desistiram desse processo de inclusão, não procurando a tutela do direito para assegurar a garantia do ensino, esperando que um dia o ensino presencial retornasse gradativamente e esse estudante pudesse retomar seus estudos.

Mesmo que a presente pesquisa tenha o escopo de analisar e se aprofundar na questão do ensino remoto, ela pode também auxiliar no método de EAD, pois torna-se uma boa alternativa para PcD que porventura tenham dificuldades de locomoção. A EAD já é uma realidade no Brasil e todas as escolas precisam se adequar a esse método de aprendizagem. No entanto, é importante frisar que existe uma diferença entre os termos ensino e educação. Nesse sentido, Landim determina:

O termo ensino está mais ligado às atividades de treinamento, adestramento, instrução. Já o termo educação refere-se à prática educativa e ao processo ensino-aprendizagem que leva o aluno a aprender a aprender, a saber pensar, criar, inovar, construir conhecimentos, participar ativamente de seu próprio conhecimento (LANDIM, 1997, p. 10).

Ou seja, não são a mesma coisa, mas são estudos igualmente aplicados de forma não presencial, que, obedecendo à legislação que versa sobre a educação e à letra de lei que tutela a educação para a pessoa com deficiência, só tem a beneficiar o processo de inclusão a todos que fazem parte dessa relação, conforme dispõe Carvalho:

O entusiasmo aparece manifesto em muitos educadores e pais, certos de que na diversidade, reside a riqueza das trocas que a escola propicia. Uma turma heterogênea serve como oportunidade para os próprios educandos conviverem com a diferença e desenvolverem os saudáveis sentimentos de solidariedade orgânica (CARVALHO, 2004, p. 27).

Sendo assim, a riqueza de trocas se faz ainda mais necessária em situações críticas, e a parceria entre pais/escola é crucial para o desenvolvimento da criança ou adolescente, beneficiando o seu crescimento intelectual, afetivo e social. A interatividade deve existir mesmo que de forma remota para gerar também o senso de cooperação, empatia, afetividade e respeito, devendo servir de combustível para se chegar a um ensino inclusivo que cumpra com as leis.

No que se refere à falta de planejamento para a aplicação do ensino remoto de qualidade, outra consequência que deve ser mencionada é que, com o intuito de evitar a evasão escolar, foi determinada a aprovação automática na rede pública.

Essa medida é um pouco arriscada para os alunos sem deficiência, mas para os alunos que são PcD's ela se torna ainda mais conflituosa, pois a aprovação automática não pode ser aplicada de forma arbitrária para todos os alunos, sob o risco de gerar uma insegurança jurídica. Sabe-se que tem o objetivo de garantir a permanência do aluno em classe regular, porém a crítica se torna existente, uma vez que seria necessário aplicar o recurso somente ao se analisar caso a caso, como por exemplo, a instituição que o aluno estuda e, se os materiais e plataformas que são fornecidos à ele e se mostram suficientes para conduzir

o estudo remoto de forma satisfatória, como esse aluno tem se desenvolvido, se responde aos estímulos de ensino e se suas limitações são respeitadas, pois somente a aprovação automática não evita o abandono escolar do aluno PcD.

Toda uma análise deveria ser feita, e o acompanhamento desse aluno, realizado periodicamente. Além disso, há como consequência as lacunas de aprendizagem, pois quando as escolas voltaram ao regime presencial, os discentes retornaram com níveis muito diferentes de conhecimento e habilidades devido à falta de preparo. É válido mencionar que nessa situação, o aluno com algum tipo de limitação sofre mais atrasos no seu aprendizado e, consequentemente, é desestimulado a dar prosseguimento aos seus estudos.

## VI. CONCLUSÃO

Diante dos resultados obtidos, é notório que o momento pandêmico foi muito desafiador. No âmbito da educação, era preciso recalculiar a rota para fornecer aos alunos com deficiência um ensino isonômico e de qualidade, mesmo que de forma remota. É preciso interagir com esse indivíduo e valorizar suas potencialidades para que ele se desenvolva de forma plena, sendo preciso adequar-se à realidade de suas limitações, para que ele não vá além de suas capacidades para conseguir acompanhar o ritmo da classe.

Foi observado que o ensino emergencial não foi vislumbrado com antecedência, sendo aplicado sem planejamento, de modo que o aluno não conseguiu aprender no âmbito escolar. Independente da deficiência que o estudante possuía, é indispensável o suporte acadêmico para o seu desenvolvimento. Vale ressaltar que esse suporte ao indivíduo PcD independe se advém de escola da rede pública ou privada. Inclusive, vemos grande disparidade no ensino quando levamos em conta a condição econômica do aluno, sendo o da rede pública mais prejudicado por ter grande parte do conteúdo oferecido de forma assíncrona.

A legislação é muito objetiva quanto aos direitos e garantias, porém as escolas, os professores e a família do discente precisam se motivar e fazer valer o que consta em letra de lei, pois a educação é uma garantia fundamental e não deve ser esquecida nem em período de pandemia, em que se fez necessário aplicar o ensino remoto.

Se a modalidade de ensino em sua forma remota fosse verdadeiramente avaliada e praticada, seria muito eficaz aos alunos com mobilidade reduzida, por exemplo, que além de terem o seu ensino garantido, teriam o acolhimento necessário em relação a suas limitações de locomoção, de maneira que seu desenvolvimento seria mais satisfatório e agradável.

Todo aluno com deficiência tem o direito à educação de forma isonômica e de ser incluído e esse papel vai além da escola. É um dever de todos nós corroborar com esse processo, seja ele presencial ou remoto.

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## Move Analysis of Conclusion Section of Aerospace Research Article

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**Abstract-** This paper reports on the move analysis of the conclusion section of the aerospace English research article (RA). The results are based on the identification of 50 pieces of aerospace conclusion section of RA, published in two leading journals that were written by English native writers from 2018 to 2023. Yang&Allison(2003) and Zhiqing Hu(2007)'s model are the starting point for the analysis. Then, the major Moves and Steps were extracted and the frequencies were calculated, which attempts to provide a modified model for aerospace research articles' conclusion section. The results reveal that the aerospace conclusion section has three major Moves, which are Move 1: Summary of study; Move 2: evaluation of study; Move 3: suggestion for future research. Most of the conclusions have Move 1 and Move 2. This study aims at improving the genre awareness of novice and non-native researchers in order to facilitate their disciplinary writing, publishing, and reading.

**Keywords:** *genre analysis, move analysis, research article, conclusion section, aerospace.*

**GJHSS-G Classification:** *FOR Code: 090199*



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# Move Analysis of Conclusion Section of Aerospace Research Article

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## I. INTRODUCTION

In the context of burgeoning international academic collaborations, the research article (RA) has gradually become one of the main channels for disseminating and advancing scientific knowledge among scholars worldwide. Hyland (1996) calls it the key medium for the legitimating of claims and of disciplines. Regarding this, the ability to read and write a professional research article in English is pivotal for scholars (Kanoksilapatham, 2005).

Since 2016, China's space technology develops by leaps and bounds. China's aviation technology, led by large aircraft and engine special projects, is rapidly improving its capabilities and levels through in-depth international cooperation. China's aerospace development urgently needs to cultivate aerospace researchers' international vision and global competency. Therefore, in order to enhance the efficiency of reading and writing aerospace research articles, both native and non-native speakers of English need to be aware of the conventional rhetorical organization used in aerospace articles to make communication more effective and dissemination of research achievement more professional (Kanoksilapatham, 2005).

Genre analysis provided by Swales (1990) becomes a frequently used method to analyze discourse in different domains. The aim of the genre-based approach is to raise learners' awareness of both

the rhetorical organization and the linguistic features closely associated with the genre. Many researchers conducted studies in various disciplines by using genre analysis. Studies focus on the different parts of the RA, especially the discipline of linguistics, with attention being paid to the structure of the abstract, introduction, methodology, and discussion section. But scant attention has been given to the aerospace discipline, especially the conclusion section.

The conclusion section plays an integral part in RA, which summarizes and evaluates the whole study and draws deductive inferences from the previous section, including pointing out the importance and limitations of the study and providing recommendations for future research (Yang & Alison, 2003). This requires writers to consider carefully the choice of language in order to conclude in a concise and powerful manner. The high-stakes nature of the conclusion sections of research articles calls for further research.

The main objective of this study is to identify the rhetorical structure of aerospace RA's conclusion section. By using Yang&Allison and Zhiqing Hu's model as references, the results of this study provide a basic template for the structuring of the aerospace RA's conclusion section. The implications of this article not only lie in raising genre awareness among aerospace novice and non-native researchers but also facilitate them to meet the international scientific community's expectations and demands.

## II. LITERATURE REVIEW

### a) Genre Analysis

The word "genre" can be traced back to the Greek word "category" or "classification" in the period of Aristotle (Hyon, 1996). Traditionally, it has several characteristics, it was a collection of fixed conventions; it mainly focuses on literature; it is based entirely on the regular form and content of passage; it is unchangeable; finally, it was divided into clear and mutually exclusive types (Zhiqing Hu, 2007). In the 20th century, modern critics have reconceptualized genre as "a dynamic set of conventions", which are associated with changing social purpose (Swales, 1990). Since the 1970s, the concept of genre has gradually penetrated into the field of linguistics (Yumei Ju, 2004). Specifically, genre analysis refers to the way in which texts are structured and organized (Hopkins & Dudley-Evans, 1988), based on that, move analysis, as a part of genre

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analysis (Swales, 1990), has been applied in a number of studies to identify the rhetorical organization of particular texts.

Generally, "move" in a genre serves a particular purpose in society and is composed of a series of segments. Some of the moves in a genre are obligatory, in that they are necessary to achieve the communicative purpose of the genre, whereas others are optional. In Hasan (1989)'s study, optional moves refer to what speakers or writers may choose to employ if they decide those moves add to the effectiveness of the communication but do not alter the purpose of the text. Each of these moves has its own purpose and contributes to the realization of the overall communicative purpose of the genre. Researchers posit different meanings for the move (Adel, 2015).

Santos (1996) mentions that a move is regarded as a stage in a particular genre with a specific communicative purpose which in turn serves certain communicative purposes of that particular genre. Similarly, Bhatia (2001) describes moves as rhetorical instruments that realize a subset of specific communicative purposes associated with a genre. More specifically, Yang & Allison (2003) define move and step as a function of a specific segment of the texts on a general level, while steps are very specific rhetorical means used to manifest and realize the move functions. Swales (2004) gives the definition from a social perspective, it is socially recognized and highly structured, referring to a communicative discursive event or activity which fulfills a particular communicative or social function in a certain community or in spoken or written discourse. Identifying moves and steps has usually been performed by English for Specific Purpose (ESP) researchers through close readings of content with the help of linguistic keys, normally, researchers refer to the move framework to identify and decipher the moves in a certain domain. Additionally, the results of move analyses have been successfully used for developing teaching and learning materials (Stoller & Robinson, 2013). Knowledge about the function of each move and the structural pattern of the whole text will allow for a greater understanding of a specific genre (Maswana S et al, 2015).

#### b) *Previous Study of RA's Conclusion Section*

Ample research has been done on the analysis of the different sections of an English research article by using the move analysis models. The conclusion section in previous studies is usually regarded as part of the research discussion in academic papers (Bunton, 2005). In this regard, unlike other sections, to date, few models and empirical studies have been proposed for the conclusion sections (Adel et al, 2015).

Posteguillo (1999) analyzed thirty-four conclusions from research articles in the field of computer science. He identified eight moves, which are

"background information", "statement of results", "(un)expected outcome", "reference to previous research", "explanation", "exemplification", "deduction and hypothesis" and "recommendation for further research". The result shows that the cyclical patterns of the conclusion section appear in his research, then, he compared his model with Yang & Allison's, showing that his model contains more moves than Yang's model.

Utilizing Yang and Allison's (2003) model, Amnuai and Wannaruk (2011) compared the rhetorical organization of English RA conclusion sections published in Thai journals with those articles published in international journals. The result reveals that the most frequent move in both sets of data was Move 1 (Summarizing the study), and the frequency of Move 2 (Evaluating the study) and Move 3 (Deductions from the research) in the international corpus was higher than that in the Thai corpus.

Bunton's (2005) proposed a model for the conclusions Chapter of Ph.D. dissertations, namely, introductory restatement, consolidation of research space, practical implications and recommendations, future research, and concluding restatement, out of which the first two are found to be obligatory.

Having combined the Models of Yang and Allison (2003) and Bunton (2005), Aslam and Mehmood (2014) explored the Moves of 50 conclusion sections of research articles in Social Sciences and Natural Sciences. Their research identifies the differences in RA's conclusion sections across various disciplines in terms of Moves and Steps.

In the discipline of law, Tessuto (2015) built up a corpus with ninety law research articles published from 2010 to 2012 in three international journals. His study indicated that even though the conclusion part has a high frequency as an independent part, it is still merged with other parts in some research articles. Besides, the three moves of the conclusion part of research articles in the field of empirical law he identified are the same as Yang & Allison (2003)'s model, with slightly different Steps in Move 2 and Move 3. The above models and empirical studies pave the way for the study of the conclusion section of RA.

#### c) *Move Models for Current Study*

Notable work for the conclusion part was carried out by Yang and Alison (2003). They distinguished the discussion section and conclusion section at the very beginning of their research. Then, they analyzed 20 conclusions from applied linguistics articles and reported the observed moves and steps. It is found that most of the move of the conclusion section possesses a linear structure. Their research has great significance and can be the authorities' reference in the conclusion section. The following are the specific Move and Step of Yang & Allison's model:

Table 1: Yang&amp;Allison's(2003) Model for Conclusion Section of RA

Move	Function
Move 1	Summarizing the study
Move 2	Evaluating the study Step 1: Indicating significance/advantage Step 2: Indicating limitations Step 3: Evaluating methodology
Move 3	Deductions from the research Step 1: Recommending further research Step 2: Drawing pedagogic implications

After a comparative analysis of 100 concluding parts of English research articles, Zhiqing Hu(2007) also developed a Move model for the conclusion section of some hard disciplines, including mechanical, electronic,

computer science, materials, aerospace, energy, chemical, physical, biological, and environmental sciences, etc. The model mainly consists of five moves. The following are specific Move and Steps of his model.

Table 2: Zhiqing Hu's (2007) Model for Conclusion Section of RA

Move	Function
Move1	Summarize the study Step 1 Provide background information Step 2 Summarize the main study steps Step 3 Summarize the main findings Step 4 Summarize the main claims
Move 2	Main contributions of the study Step 1 Present the validity of the study Step 2 Identify the strengths of the study Step 3 Identify the importance of the study Step 4 Identify the practical applications of the study
Move 3	Limitations of the study
Move 4	Make Suggestions for future research

In this paper, Yang&Allison (2003)'s model and Zhi qinghu's (2007) model are adopted to analyze aerospace conclusions as the starting point, because the two models have a great similarity. Besides, Yang & Allison's model seems to fit best the conclusion section, although it is based on linguistics, it has been widely used in the analysis of moves and steps in different disciplines and has greater reference value (Adel et al, 2015). Moreover, Zhiqing Hu's model further improved Yang&Allison's model, and based on that, he established a model for hard disciplines, which is fit for the present aerospace corpus. Therefore, the combination of the two models provides a solid theoretical basis and a high degree of credibility for this research.

### III. METHODOLOGY

#### a) Research Question

This study is a corpus-based move analysis of the aerospace conclusion section of RA by native

English writers, by analyzing 50 pieces of conclusions, this research aims to answer the following two questions:

1. What is the distribution of Moves and Steps in aerospace RA's conclusion section?
2. What rhetorical structure model is suitable for aerospace RA's conclusion section?

#### b) Corpus Collection

The aerospace discipline in this research can be focused on the study of avionics systems, aircraft design, manufacturing, and other aspects related to mathematics, physics, computers, etc.

Based on the above aerospace research direction, following the principles of representativeness, authority, and accessibility proposed by Nwogu (1997), a random sample of 50 articles written by native English speakers were selected from the following two high-profile journals: *Progress in Aerospace Sciences*, *Aerospace Science and Technology*, the period lasts



from 2018 to 2023. All these two journals are recommended by aerospace researchers and experts, these two journals belong to authoritative foreign aerospace journals with long-standing impact factors, and have a high volume of publications, thus ensuring the English proficiency and professionalism of the authors. More importantly, the above two journals cover most of the research directions of aerospace and aeronautics, including astronautic engineering, aircraft design, aerodynamics, space structure, etc.

Importantly, it is worth noticing that the definition of native English speakers in this research has two ways to identify, the first author was from an inner-circle country whose native language was English, such as America, UK, Canada, Australia, etc, and the first author's name-writing system was also used as a reference for identification. (Medgyes P, 2001).

#### c) *Corpus Annotation*

Corpus annotation is the most crucial process in this research, the reliability of move identification can be achieved by inviting different coders to conduct corpus annotation together. To ensure that the coder has expertise in the focused discipline, two aerospace major Ph.D. candidates served as assistants for annotation. Another coder who majors in linguistics will join in move identification. The author conducted a 3-hour training and discussion session for the participants so as to assure that the coder clearly understood how to code a sample text using the coding scheme (Kanoksilapatham, 2005). Moreover, we asked for cooperation from aerospace experts in identifying some professional knowledge that is difficult to understand. After the annotation was completed, by

#### a) *The Distribution of Moves and Steps*

*Table 1:* The Frequency of Moves and Steps in Aerospace Conclusion Section

Move and Step	Number	Frequency
Move 1 Summary of Study	50	100%
Step 1 Summary of Background	20	40%
Step 2 Summary of Purpose	44	88%
Move 2 Evaluation of Study	41	82%
Step 1 Evaluation of Method	30	60%
Step 2 Evaluation of Result	36	72%
Step 3 Evaluation of Contribution/Limitation	22	44%
Move 3 Suggestion for Future Research	18	36%

#### b) *Move 1: Summary of Study*

From table one, there are 50 Move 1 that appears in the aerospace conclusion section, which is the most frequent Moves, proving Move 1 is obligatory Move in the aerospace conclusion section, this result is in line with Yang & Allison's (2003) study in the Linguistics corpus.

using SPSS.20, the kappa coefficients of the annotation result were checked for consistency and subsequently discussed and adjusted the move identification until a high degree of agreement was reached, then a model for aerospace discipline of the conclusion section of RA is produced.

#### d) *Instruments*

Totally three tools are employed in the process of move identification and data analysis. BFSU Stanford Pos Tagger 1.1 and Microsoft Word are used to input the texts and code; SPSS2.0 is used to do the data analysis; Antmover1.0 is assisted to identify the move and the function of the sentence unit.

## IV. RESULT AND DISCUSSION

After the annotation of 50 pieces of writing, a modified model based on Yang&Allison (2003) and Zhiqing Hu (2007) is put forwards for aerospace RA conclusion. We extracted three major Moves based on the analysis of the corpus, including Move 1: summary of the study; Move 2: evaluation of the study, and Move 3: suggestion for future research. Also, five Steps are specifically shown within the three moves. There is a total of 108 Moves and 152 Steps in these 50 writing pieces. According to Kanoksilapatham (2005), Moves having 100% occurrences are identified as obligatory. To be recognized as a conventional move, a move must occur in 60% of the appropriate sections in the corpus. If the frequency of a move falls below 60%, it is considered optional (Kanoksilapatham, 2005). Based on the above criteria, this section presents both the statistical analysis and the explanation of each Move and Step in the studied corpus.

The main function of Move 1 is to make a summary of the claim of the study. This move includes two Steps, the first Step is the summary of the background, aiming to provide background information about the theory and some key definition of concepts, in this Step the author usually use one or two sentences to provide a precise background and indicate a research

gap. Step 2 is the summary of the purpose, which includes the statement about the purpose and introduction of the study. Since the main function of the conclusion section is to summarize the main claim of the study, Move 1 is a necessary one to be included in the conclusion section.

Tracing back to the original text, after introducing the background information in Step 1, the author usually shows the purpose of their study in the following Step. One interesting finding is that not every conclusion section has Step 1 because this Step is usually found in the abstract and introduction sections of an article, we usually do not find it necessary to repeat the background information related to the study in the conclusion section since background knowledge is a consensus between writers and readers. However, the background information in the conclusion section is shorter than in the abstract and introduction sections and is mostly aimed more at helping the reader better understand the author's research. This Step is not a necessary one for the conclusion. If the author uses this Step in Move 1, it is usually found at the beginning of the conclusion section (Zhiqing Hu, 2007). While Step 2 in Move 1 seems to be conventional, which accounts for 88%. There are some typical expressions in Move 1:

*Example one: The flow field around an oscillating, straked delta wing was analyzed numerically. (Move 1: Step 1: Summary of Background)*

*Example two: In this work, the ability of the harmonic balance method to deal with transonic buffet flows has been evaluated. (Move 1: Step 2: Summary of Study)*

#### c) Move 2: Evaluation of Study

The total Frequency of Move 2 accounts for 82% of the corpus, showing that most of the conclusion section includes an evaluation of their research. Specifically, Step 1 in Move 2 is 60%, and Step 3 accounts for 72%, which are higher than Step 3. The statistic shows that Step 1 and 2 in Move 2 is conventional, only 22 pieces contain Step 3, proving that this step is not a required Step in Move 2. The above results corresponds with Zhiqing Hu's (2007) research.

Move 2 aims to evaluate the research method, result, and limitation or contribution of the study. In the first Step, the authors outline the main steps and procedure of the study. Since the papers we selected are from aerospace journals, many of the papers in which the authors have built models performed experiments, or formulate formulas. Therefore, in this Move, the authors describe how the model was built or how the experiments were conducted, and what methods were used in this study. What's more, the evaluation of results is also presented after the explanation of the research method, the authors summarize the main empirical experimental results, often in the form of a logical order by using "first", "second". Then, the evaluation of limitations or

contributions will be given. This Step aims to point out the main contribution or limitation of the study. The author indicates the validity, significance, merits, and practical applications of the study, or indicates what is not solved in the study, or the circumstance under which their research is not applicable (Zhiqing Hu, 2007). The following are some typical expression of these Move and Steps:

*Example two: These numerical simulations were obtained using 1200 cores of the NASA's Pleiades supercomputer during three weeks, i.e., approximately  $6 \times 10^5$  core-hours. Comparison to measurements within arc heaters, such as those of Winter et al. (Move 2: Step 1: Evaluation of method)*

*Example three: It has been shown that a combination of surface properties, in particular topography and chemistry, need to be optimised in order to effectively mitigate insect residue adhesion. (Move 2: Step 2: Evaluation of result)*

*Example Four: The propellant studies were limited to available literature data on well-known ionic liquids, so future research should focus on creating novel liquid propellants designed specifically for multimode propulsion. (Move 2: Step 3: Evaluation of limitation)*

#### d) Move 3: Suggestion for Future Research

Among 50 pieces, we found 18 pieces have Move 3, which shows that Move 3 is optional and less used in the conclusion section. Move 3 intends to provide direction for future research based on the author's research. It usually appears at the end of the conclusion.

*Example Five: Future researchers should look to a cohesive comparative study of predictions made by each of the models, developed under a consistent framework and validated against a comprehensive experimental database. (Move 3: Suggestion for future research)*

## V. CONCLUSION

Successful writing of the conclusion section of a research article contributes to a thorough and understandable unfolding of the whole RA. With this being said, good writing of the conclusion is fundamental to the writers. This article reports on the result of the Move analysis of the aerospace conclusion section of RA. Based on the findings of the analysis, a modified two-level rhetorical structure (Moves and Steps) based on Yang & Allison (2003) and Zhiqing Hu (2005)s' has been developed for aerospace conclusions.

The study expands the application of move analysis to aerospace research articles, and yields a better and deeper understanding of the conclusion section of aerospace RA for scholars, raises genre awareness in academic writing, and facilitates them to take part in the international academic community. In addition to the theoretical contributions to discourse analysis, this study offers practical implications to those novice and non-native researchers in reading and

writing instruction of academic articles. The modified model for the conclusion section can be applied in the classroom of aerospace English academic writing class to raise learners' consciousness of discipline-specific reading and writing skills. (Kanoksilapatham, 2005). However, there are still some drawbacks associated with this research, manual annotation of the corpus may influence the result, and further investigation is needed to provide a more scientific method in academic discourse analysis.

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## Using Hands-on Experiences including Various Forms of ARTS to Increase Ninth-Grade Female Students' Interest in STEM - Final Results

By Hui Fang Huang Su, Jia Borrer & Teri Williams

**Abstract-** Due to the ever-growing number of employment opportunities in the science, technology, engineering, and math fields, increasing emphasis is placed on STEM education at all levels. This paper reports on research on increasing STEM interest and awareness in ninth-grade minority female students. Thirty-seven female students from a low socioeconomic background participated in this research study. They attended fifteen hour-long sessions of STEM-infused hands-on workshops presented by university professors in the College of Education and the College of Arts and Sciences. The workshops took place during school hours, adding to their regular curriculum. The school does not currently have an arts program, although the founder of the school is a music artist. Therefore, the workshops incorporated the arts as the central theme, while the lessons were delivered in biology, chemistry, engineering, and mathematics.

**Keywords:** high school STEM education, female students, integrating the ARTS, STEM interest, and awareness.

**GJHSS-G Classification:** DDC Code: 349.42 LCC Code: KD660



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# Using Hands-on Experiences Including Various Forms of ARTS to Increase Ninth-Grade Female Students' Interest in STEM – Final Results

Hui Fang Huang Su <sup>α</sup>, Jia Borrer <sup>σ</sup> & Teri Williams <sup>ρ</sup>

**Abstract-** Due to the ever-growing number of employment opportunities in the science, technology, engineering, and math fields, increasing emphasis is placed on STEM education at all levels. This paper reports on research on increasing STEM interest and awareness in ninth-grade minority female students. Thirty-seven female students from a low socioeconomic background participated in this research study. They attended fifteen hour-long sessions of STEM-infused hands-on workshops presented by university professors in the College of Education and the College of Arts and Sciences. The workshops took place during school hours, adding to their regular curriculum. The school does not currently have an arts program, although the founder of the school is a music artist. Therefore, the workshops incorporated the arts as the central theme, while the lessons were delivered in biology, chemistry, engineering, and mathematics. The study is motivated by the need to close the achievement gap and improve the representation of women and minorities in STEM fields. Data were collected through surveys, assessments, and interviews and analyzed using quantitative and qualitative methods. The significance of the study lies in the potential to inspire underserved females to enter the STEM fields.

**Keywords:** *high school STEM education, female students, integrating the ARTS, STEM interest, and awareness.*

## I. INTRODUCTION

Job and career opportunities in STEM experienced tremendous growth each year. Because of this, industry professionals, politicians, and educators strongly encourage and support students matriculating into degree programs in the STEM field. While the growth in the number of graduates needed to fill the increasing number of opportunities is promising, female and minority students are underrepresented in the STEM fields (National Science & Technology Council, 2018). Many educators believe a lack of interest in the STEM professions begins at an early age. Disenfranchised students need the opportunities afforded to students in more affluent areas of a school district, city, or state (Anderhag *et al.*, 2016). Research shows a lack of minority female students going into the STEM fields. This is partly due to the need for more awareness of the STEM field. This STEM knowledge and understanding measured at the beginning and end of the research study will be shared after the final analysis.

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The researchers, as well as the workshop presenters, are faculty members at a private university located in the state of Florida. The study aimed to include 9th-grade female students from all racial and ethnic backgrounds and expose them to hands-on workshops related to STEM. Further, it is the view of the researchers involved in this study that this population of minority, underserved students will benefit from the infusion of the arts in this project. According to Brouillette (p.58), "Now there is growing recognition that, in STEAM projects, the arts not only play their traditional content area role but also scaffold the teaching of science concepts that students could not otherwise envision." One challenge educators face introducing new, often unfamiliar STEM concepts is building a personal connection that will have meaning. Through creative, arts-based approaches, this challenge is more likely to impact the imagination and interest of the student. This effort to connect is carefully crafted by the educator, with the emphasis being placed on STEM disciplines. The arts are a paved learning pathway that allows students to invent, problem-solve, create, and make what they are learning tangible. The research location is a public charter school that receives funding from the state. The principal and his leadership team provided the physical space and staffing necessary to support the STEAM workshops. STEAM professionals recruited from Nova Southeastern University delivered art-focused presentations at the weekly meetings.

The ninth-grade female students were asked to participate in this research study provided by faculty members from the researchers' University because they are currently enrolled in an intervention High School. The parents of these underaged children must grant permission to allow their child to participate. These students were chosen based on students having similar academic performance. One group of 25 female students was identified from the school's advanced science class (biology), with the remaining 12 students participating on a volunteer basis. The biology class has a Florida-certified teacher and two aides.

## II. METHOD AND MATERIALS

The school helped identify all 37 students to participate in this study. These students participated in weekly STEM (STEAM) workshops with a pre-planned

STEM (STEAM) curriculum that the presenters and the researchers created. In addition, the students took a pre-survey using the S-Stem questionnaire regarding their perceptions of the STEM (STEAM) program before the start of the project. Following the 15 STEM (STEAM) workshop sessions, the participating students will take a post-survey using the S-STEM questionnaire. The research team will compare the pre-and post-questionnaire results at the end of the intervention period.

All participants have the right not to participate and leave the study anytime. If they decide not to participate or go, they will still receive the regular science program at the school but will not be part of the research study. However, if a student chooses to stop being in the study before it is over, any information collected (such as the pre-survey) will be kept in the research records for 36 months from the end of the study and may be used as a part of the research.

There is no guarantee or promise that participants will receive any benefit from this study. The possible use of being in this research study is to know how their perception of the STEM (STEAM) field has changed and science knowledge has improved at the end of the study. The researchers intend that information learned from the survey will benefit people in similar settings.

All information about the participants in this research study will be handled confidentially, within the limits of the law, and will be limited to people who need to review this information. The lead researcher stored

the participant information on a university computer. The researchers will use the data for granting agencies and publications to share knowledge with other researchers and educators.

Many K-12 students, predominantly minority female students in the United States, lack the knowledge and skills to continue their STEM education and ultimately enter the workforce. There is an estimated 13% growth rate of STEM careers between 2017 and 2027, compared to 9% in other career fields (Education Commission of the States, 2020). To meet this need for STEM professionals, educational leaders in the United States are adamant in stating, "to hold a competitive edge in a rapidly changing global workforce, bolstering the nation's science, technology, engineering, and math (STEM) workforce is essential" (National Education Association, 2016).

Although in their earliest years, children are natural scientists, engineers, and problem-solvers (Murphy, 2001), by the time these same students reach the 8<sup>th</sup> grade, over 50% have lost interest in focusing on higher education or a career in one of the STEM disciplines. Other researchers strongly believe that students are interested in STEM disciplines; a strong interest never develops (McCreedy & Kierking, 2013). Regardless of the reason, the fact remains that our STEM pipeline is significantly reduced by the time students reach middle school, secondary school, and college. Females, students from lower socioeconomic backgrounds, and students from ethnic or racial minority groups are most affected (Figure 1).

Example 1	Strongly Disagree	Disagree	Neither Agree nor Disagree	Agree	Strongly Agree
	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Figure 1: Perceived Reasons for Gender and Ethnic Underrepresentation in STEM

Of these, equal gender representation is the most significant concern for educators. Studies have shown that, while gender disparity is lessening, more can be done to recruit females into STEM-related higher education and careers (Hawkins, 2015). Efforts to rectify this problem have shown that early exposure to informal STEM experiences can positively affect learning and participation (Langdon et al., 2011). This research project involved developing and delivering weekly STEAM hands-on workshops to high-school females and evaluating their effect on STEM interest, awareness, and knowledge. The study was conducted in an urban, predominantly Hispanic, lower socioeconomic Title 1 school in West Palm Beach, Florida. An over-arching research question guided the work: "Can participation in weekly STEAM workshops increase young females' STEM interest and awareness?"

In the most recent census, West Palm Beach, Florida, had approximately 110,000 residents, with a racial breakdown of 37% non-Hispanic white, 34%

African American, and 25% Hispanic, earning a median income of roughly \$54,000 (United States Census Bureau, 2019). The School District of Palm Beach County (SDPBC) consists of 160 K-12 schools enrolling approximately 170,000 students yearly. The district offers over 300 Choice programs that allow students to focus on various personal interests (e.g., the International Baccalaureate program, programs dedicated to music and the fine arts, information technology, and foreign languages). In addition, three schools host Choice STEM programs at the high school level (Palm Beach County Schools, 2020).

The high school hosting the research project is a Title 1 institution with a population of approximately 200 students. In the most recent school year, the population was about 70% Hispanic, 14% Black, and 12% non-Hispanic white; the remaining 4% represented other racial and ethnic groups. The population is 44% female and 56% male, and 88% of students are eligible for free or reduced lunch. In addition, the school has ten

Choice Programs, a no Choice STEM program (Palm Beach County Schools, 2020).

This research aimed to develop and deliver a STEM-focused weekly program at the high school. This study focused on all aspects of STEM integrating the arts. The participants included female, predominantly Hispanic, 9th-grade students. Administrators at the school provided teachers, staff, and the physical space necessary to support the program. In addition, STEM professionals from the researchers' private university were recruited and delivered focused presentations at the weekly meetings, including anatomy, elementary physics, food science, botany, 2-D painting/drawing, sound, engineering, Tai Chi, and physiology.

The *Student Attitudes Toward STEM Survey* (S-STEM) measures students' interest and awareness of STEM content and careers (Friday Institute for Educational Innovation, 2012) and has shown

acceptable levels of reliability and construct validity (Faber et al., 2013; Unfried et al., 2015). The S-STEM consists of four sections to measure one make within the STEM domain (i.e., science, technology, engineering, and math). For this study, the researchers used a modified version of the science section comprised of nine statements with answers ranging from "Strongly Disagree" to Agree Strongly." The answers will represent numeric values ranging from 1 to 5; an overall average will be computed.

Based on the Central Limit Theorem (CLT), the sample size of 37 is sufficient for statistical significance. The Central Limit Theorem is used so that the sampling distribution will always be generally distributed if the sample size is large enough, in our case, 37 students.

The pre-survey on Science, Technology, Engineering, and Mathematics was given in October 2022 before the workshops (Figure 2).

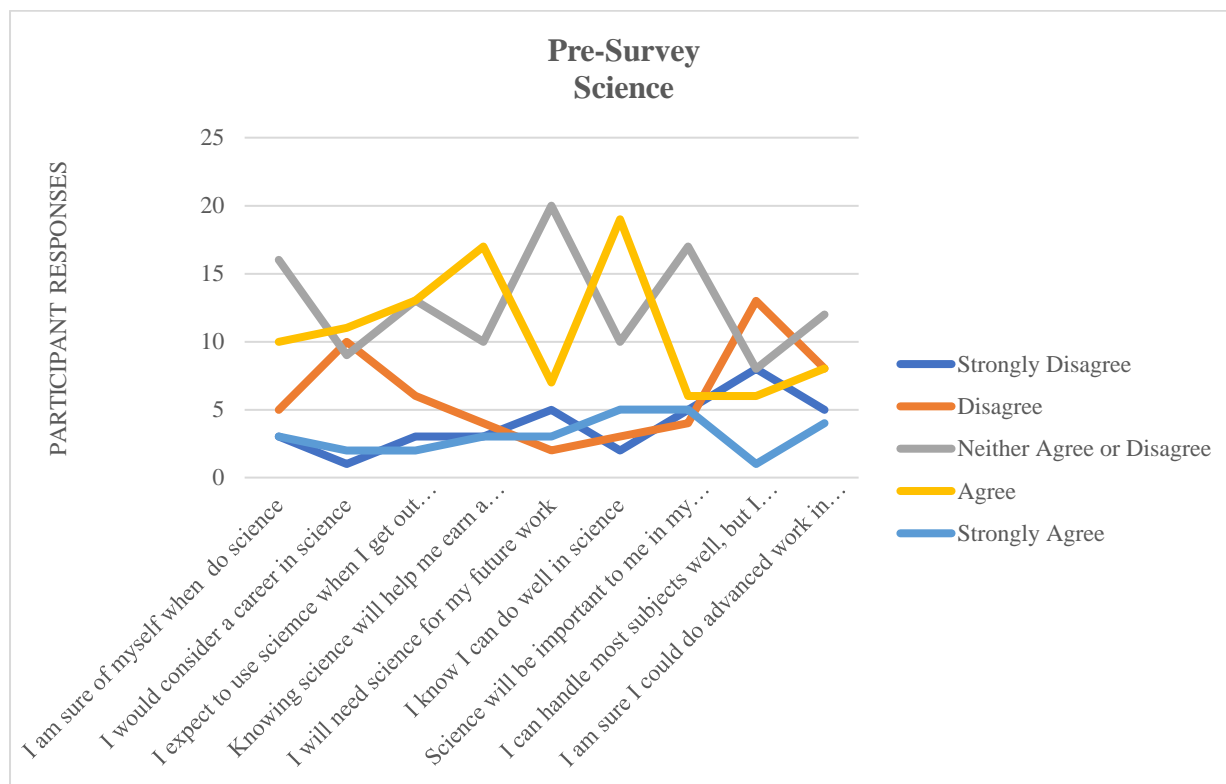


Figure 2: Sample Pre-Survey Results (Science)

### III. RESULTS AND DISCUSSION

Statistical methods for analyzing data are critical as they provide necessary insight to researchers. For individuals conducting research problems, it is essential to understand how to develop a research problem, along with a plan for gathering data, followed by ways to interpret the collected data. Next, researchers gather raw data and transform them into graphs to further dissect the results. Finally, researchers can conclude a population using analysis methods such as descriptive statistics, inferential statistics, and

correlation analysis. This study will investigate 9th-grade female students' attitudes and abilities toward four areas of STEM following a survey obtained from a population sample.

#### a) Development of Raw Data into Graphs

The central limit theorem is the principle that the distribution from sample means makes assumptions as a population grows. Using the preliminary pre-survey data of 9th-grade female students, we can make assumptions about the people of all 9th-grade female students regarding the sample responses to the

questions about the four areas of STEM. The post-survey data was compared to the preliminary data to determine if the students' beliefs remained the same or experienced a change.

For this study, the students were asked preliminary questions regarding their feelings and abilities in four areas of STEM: math, science, engineering, and technology. The questions required the

students to respond with one of the provided answer choices, strongly disagree, disagree, neither agree nor disagree, coordinate, and strongly agree. Established answer choices allow for easy understanding and better comparison between the students and the post-survey data. In addition, the preliminary survey results were developed into a graph to provide a visual of the data.

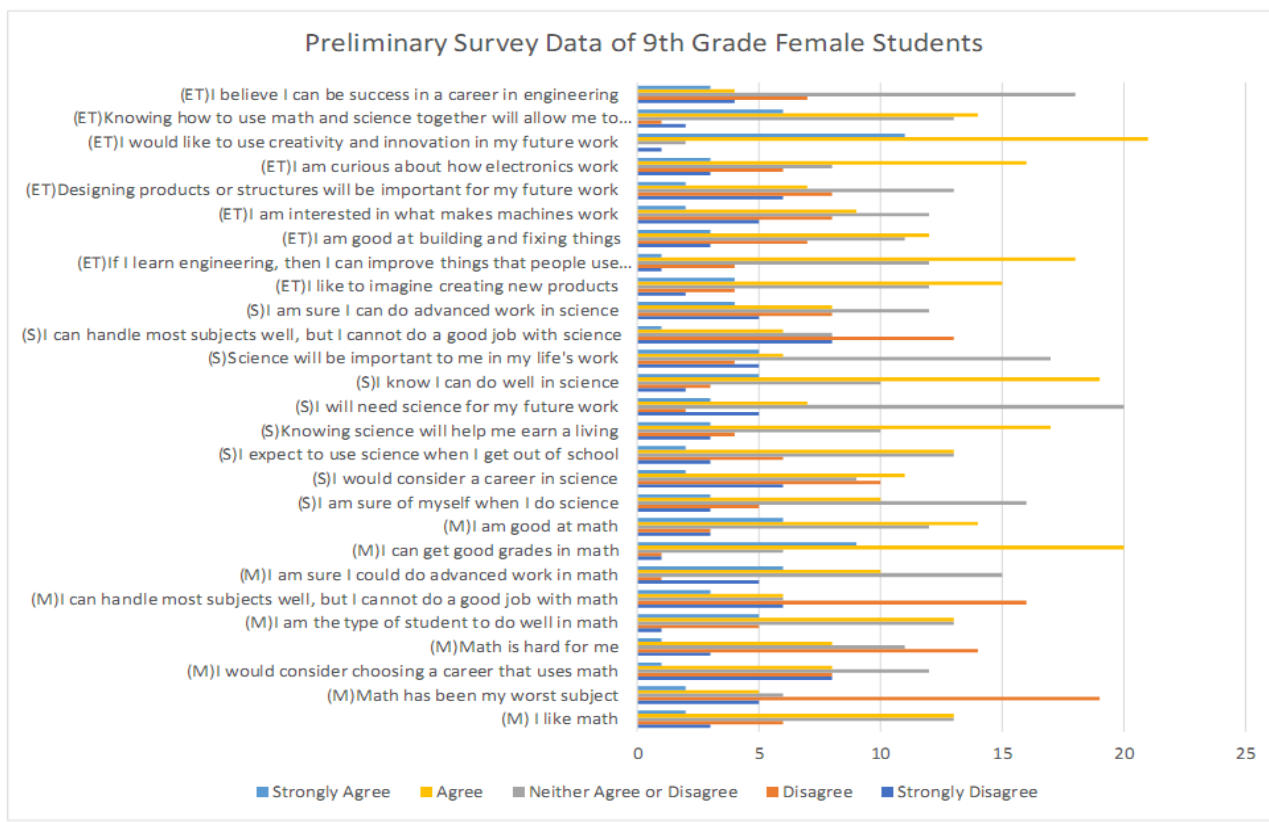


Figure 2: Preliminary Survey Data

A bar graph is determined to suit the data best to show all responses on the same plane. This graph easily distinguishes the frequency of each response to the questions. From this, we can gather some general assumptions regarding 9th-grade female students. For example, the question "Math has been my worst subject" produced a substantial number of "disagree," while the other responses were somewhat equal. This tells us that most students do not think math is their worst subject.

#### b) Descriptive Statistics Analysis

To better understand the results of the survey, it is advisable to make use of descriptive statistics. Measures of central tendency and variability are often used first to analyze data. The main direction is determined by uncovering the mean, median, and mode. Variability considers the responses' dispersion using tools such as range and interquartile range.

Due to the nature of the survey, the data would be considered ordinal. The research questions are

formatted in a way that generates responses on a scale known as a Likert scale (Sullivan & Artino, 2013). Likert data requires respondents to rank their agreeableness to each statement. Reactions in the data set are among five choices ranging from strongly disagree to agree strongly. The differences between each option are not necessarily equal, which allows us to consider this ordinal data (Sullivan & Artino, 2013).

Ordinal data is best analyzed using median, mode, range, and interquartile range. Inputting the survey data into the SPSS software computes this information for further analysis. Each question is labeled as the subject abbreviation followed by the question number (e.g., M1 = "I like math"). The responses are converted into quantitative data for ease of interpretation. Therefore, 1= strongly disagrees, 2= disagree, 3= neither agree nor disagree, 4= agree, and 5= strongly agree.



Figure 3: (Tables 1, 2, and 3): Raw Data Analysis

		Statistics						
		M8	M9	S1	S2	S3	S4	S5
N	Valid	37	38	37	38	37	37	37
	Missing	2	1	2	1	2	2	2
Median		4.0000	4.0000	3.0000	3.0000	3.0000	4.0000	3.0000
Mode		4.00	4.00	3.00	4.00	3.00 <sup>a</sup>	4.00	3.00
Range		4.00	4.00	4.00	4.00	4.00	4.00	4.00
Minimum		1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	5.00	5.00	5.00	5.00	5.00	5.00
Percentiles	25	4.0000	3.0000	3.0000	2.0000	2.5000	3.0000	3.0000
	50	4.0000	4.0000	3.0000	3.0000	3.0000	4.0000	3.0000
	75	4.5000	4.0000	4.0000	4.0000	4.0000	4.0000	4.0000

		Statistics						
		M1	M2	M3	M4	M5	M6	M7
N	Valid	37	37	37	37	37	37	37
	Missing	2	2	2	2	2	2	2
Median		3.0000	2.0000	3.0000	3.0000	3.0000	2.0000	3.0000
Mode		3.00 <sup>a</sup>	2.00	3.00	2.00	3.00 <sup>a</sup>	2.00	3.00
Range		4.00	4.00	4.00	4.00	4.00	4.00	4.00
Minimum		1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	5.00	5.00	5.00	5.00	5.00	5.00
Percentiles	25	2.5000	2.0000	2.0000	2.0000	3.0000	2.0000	3.0000
	50	3.0000	2.0000	3.0000	3.0000	3.0000	2.0000	3.0000
	75	4.0000	3.0000	3.5000	3.5000	4.0000	3.5000	4.0000

		Statistics						
		S6	S7	S8	S9	ET1	ET2	ET3
N	Valid	39	37	36	37	37	36	36
	Missing	0	2	3	2	2	3	3
Median		4.0000	3.0000	2.0000	3.0000	4.0000	4.0000	3.0000
Mode		4.00	3.00	2.00	3.00	4.00	4.00	4.00
Range		4.00	4.00	4.00	4.00	4.00	4.00	4.00
Minimum		1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	5.00	5.00	5.00	5.00	5.00	5.00
Percentiles	25	3.0000	2.5000	2.0000	2.0000	3.0000	3.0000	2.0000
	50	4.0000	3.0000	2.0000	3.0000	4.0000	4.0000	3.0000
	75	4.0000	4.0000	3.0000	4.0000	4.0000	4.0000	4.0000

		Statistics						
		ET4	ET5	ET6	ET7	ET8	ET9	
N	Valid	36	36	36	35	36	36	
	Missing	3	3	3	4	3	3	
Median		3.0000	3.0000	4.0000	4.0000	4.0000	3.0000	
Mode		3.00	3.00	4.00	4.00	4.00	3.00	
Range		4.00	4.00	4.00	4.00	4.00	4.00	
Minimum		1.00	1.00	1.00	1.00	1.00	1.00	
Maximum		5.00	5.00	5.00	5.00	5.00	5.00	
Percentiles	25	2.0000	2.0000	2.2500	4.0000	3.0000	2.0000	
	50	3.0000	3.0000	4.0000	4.0000	4.0000	3.0000	
	75	4.0000	3.7500	4.0000	5.0000	4.0000	3.0000	

a. Multiple modes exist. The smallest value is shown

The data in the tables allows for a more straightforward interpretation of the survey results. The mode is valuable because it tells the researcher which response was the most common and indicates how most participants felt toward the question. The median is also helpful because it means the researcher is where the middle of the distribution lies. The range for all variables will be four due to the five total response choices. Therefore, the interquartile range will provide a more accurate measure of dispersion. The interquartile content can be calculated by subtracting the 25<sup>th</sup> and 75<sup>th</sup> percentile. A minor difference between the first and third quartiles indicates consensus among the participants.

Due to this being ordinal data, the uncertainty of the distance between responses means some statistical

functions will be less accurate. Therefore, other data types will find other interpretation methods valid. This will include the measure of central tendency, mean, which indicates the statistical average of the data results. In addition, different kinds of data will utilize the methods of dispersion, standard deviation, and variance. Standard deviation indicates the average distance between the response from the mean. Variance is equal to standard deviation squared and is only used when standard deviation cannot be used. Although this information is regarded as less suitable for ordinal data, some statisticians support this data's significance, so it may be beneficial to consider this information if it is not the sole basis for decision-making.

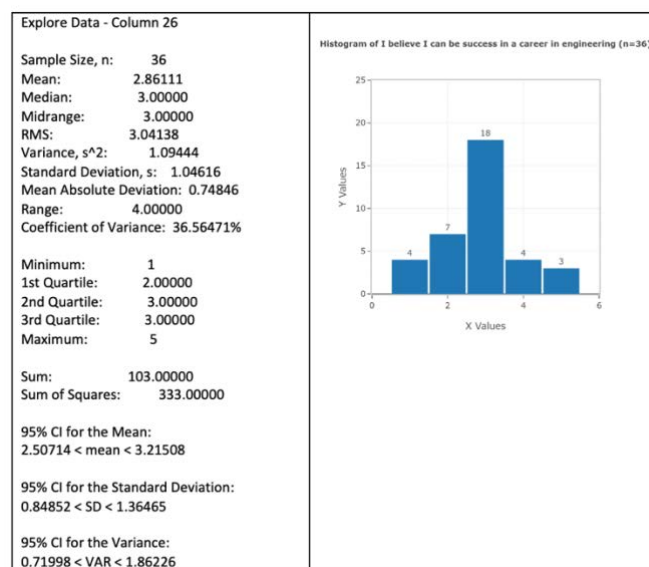
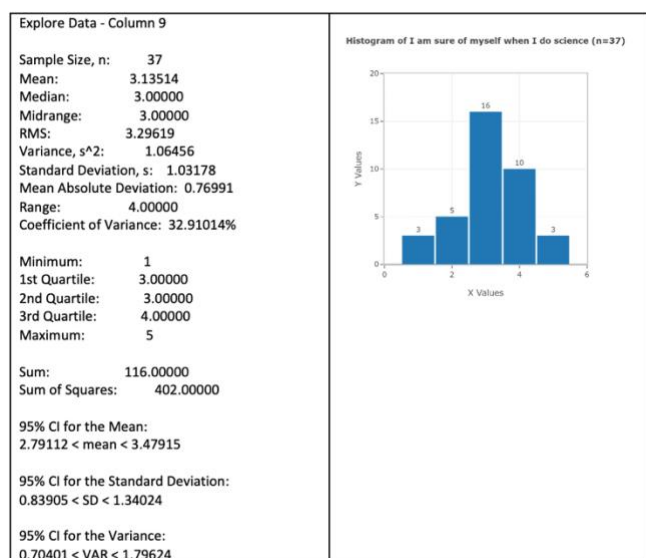
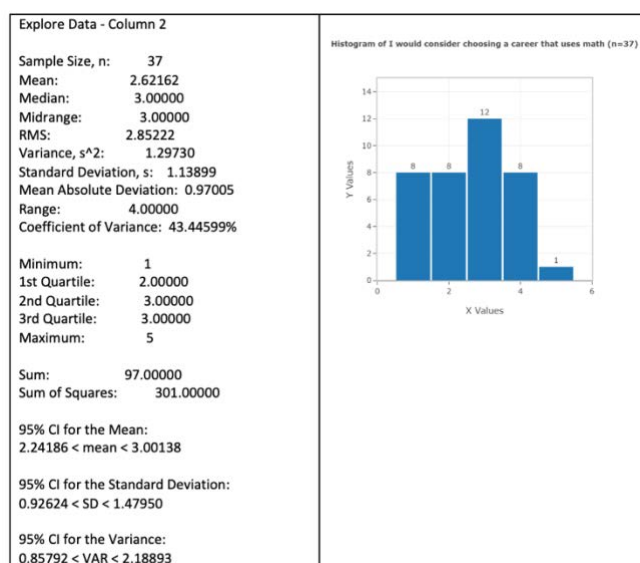
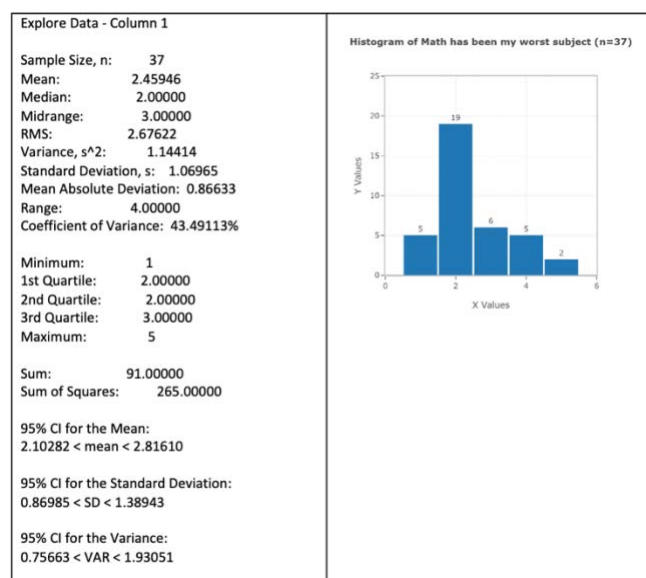


Figure 4: Samples of Explore Data

### c) Inferential Statistics Analysis

Inferential statistics are used to make assumptions about an entire population based on sample data. For example, using the preliminary data from the survey of 9th-grade female students, we can conclude about the whole 9th-grade female population. Comparing the data to the post-survey data can clarify the hypotheses' validity. To interpret ordinal data, it is best to utilize non-parametric procedures. Non-

parametric tests are performed using the median, making them ideal for ordinal data. Non-parametric analysis can be conducted using the Mann-Whitney, Wilcoxon, Kruskal Wallis, and Friedman tests.

The survey's preliminary data is summarized in the chart following the intervention. It is important to note that the data is obtained from a smaller sample size. However, the participants remain 9th-grade female students.

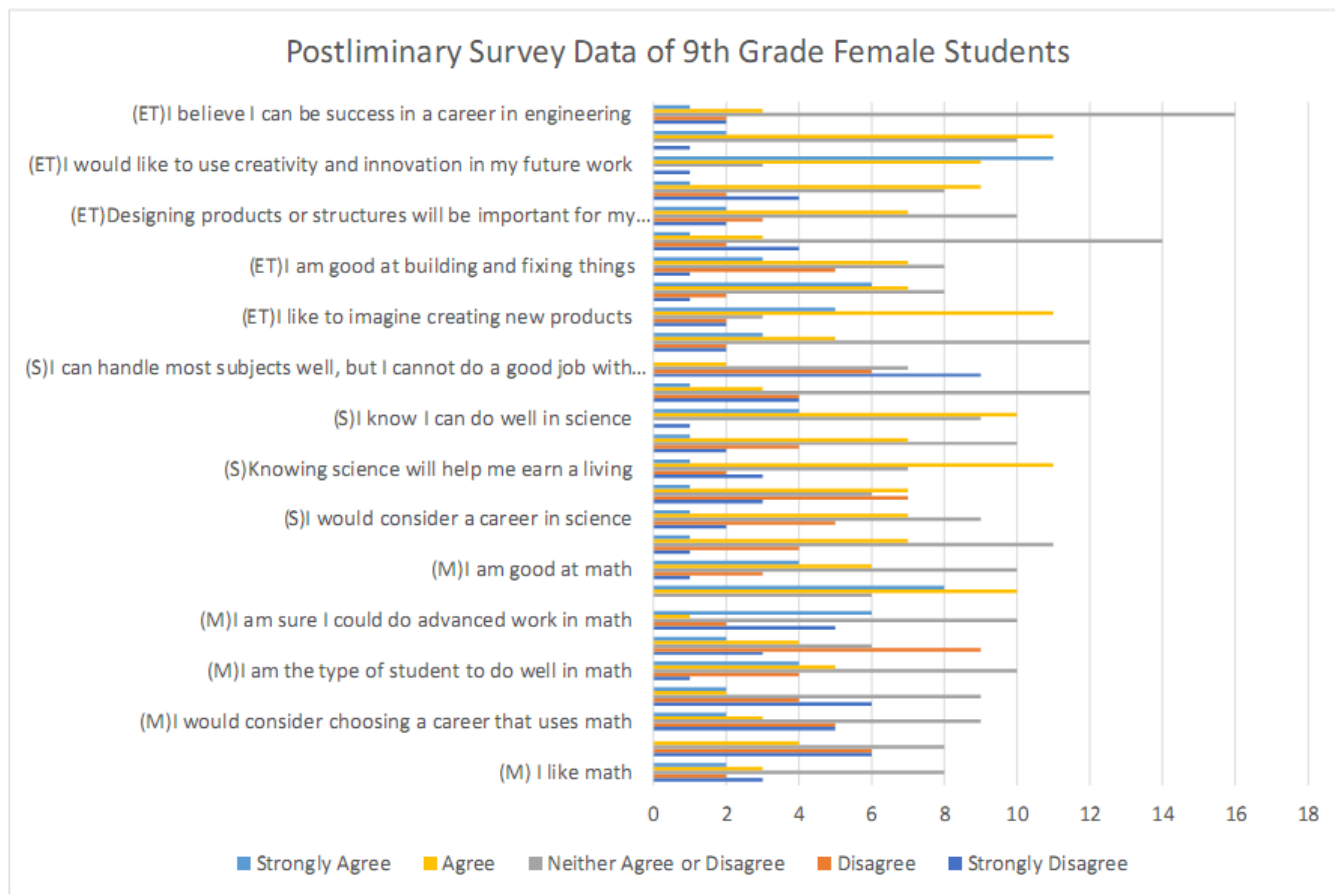


Figure 5: Post-Liminary Survey Data

The corresponding descriptive statistics are compiled into the following tables for secondary visual analysis. The preliminary data also uses ordinal data

descriptive statistics such as median, mode, range, and interquartile range.

		Statistics						
N	Valid	M1	M2	M3	M4	M5	M6	M7
	Missing	18	24	24	24	24	24	24
Median		3.0000	2.5000	3.0000	3.0000	3.0000	2.5000	3.0000
Mode		3.00	3.00	3.00	3.00	3.00	2.00	3.00
Range		4.00	3.00	4.00	4.00	4.00	4.00	4.00
Minimum		1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	4.00	5.00	5.00	5.00	5.00	5.00
Percentiles	25	2.0000	1.2500	2.0000	1.2500	3.0000	2.0000	2.0000
	50	3.0000	2.5000	3.0000	3.0000	3.0000	2.5000	3.0000
	75	4.0000	3.0000	3.0000	3.0000	4.0000	3.7500	4.7500

Statistics

		M8	M9	S1	S2	S3	S4	S5
N	Valid	24	24	24	24	24	24	24
	Missing	4	4	4	4	4	4	4
Median		4.0000	3.0000	3.0000	3.0000	3.0000	3.5000	3.0000
Mode		4.00	3.00	3.00	3.00	2.00 <sup>a</sup>	4.00	3.00
Range		2.00	4.00	4.00	4.00	4.00	4.00	4.00
Minimum		3.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	5.00	5.00	5.00	5.00	5.00	5.00
Percentiles	25	3.2500	3.0000	3.0000	2.0000	2.0000	3.0000	2.2500
	50	4.0000	3.0000	3.0000	3.0000	3.0000	3.5000	3.0000
	75	5.0000	4.0000	4.0000	4.0000	4.0000	4.0000	4.0000

Statistics

		S6	S7	S8	S9	ET1	ET2	ET3
N	Valid	24	24	24	24	23	24	24
	Missing	4	4	4	4	5	4	4
Median		4.0000	3.0000	2.0000	3.0000	4.0000	4.0000	3.0000
Mode		4.00	3.00	1.00	3.00	4.00	3.00	3.00
Range		4.00	4.00	3.00	4.00	4.00	4.00	4.00
Minimum		1.00	1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	5.00	4.00	5.00	5.00	5.00	5.00
Percentiles	25	3.0000	2.0000	1.0000	3.0000	3.0000	3.0000	2.2500
	50	4.0000	3.0000	2.0000	3.0000	4.0000	4.0000	3.0000
	75	4.0000	3.0000	3.0000	4.0000	4.0000	4.7500	4.0000

Statistics

		ET4	ET5	ET6	ET7	ET8	ET9
N	Valid	24	24	24	24	24	24
	Missing	4	4	4	4	4	4
Median		3.0000	3.0000	3.0000	4.0000	4.0000	3.0000
Mode		3.00	3.00	4.00	5.00	4.00	3.00
Range		4.00	4.00	4.00	4.00	4.00	4.00
Minimum		1.00	1.00	1.00	1.00	1.00	1.00
Maximum		5.00	5.00	5.00	5.00	5.00	5.00
Percentiles	25	2.2500	3.0000	2.2500	4.0000	3.0000	3.0000
	50	3.0000	3.0000	3.0000	4.0000	4.0000	3.0000
	75	3.0000	4.0000	4.0000	5.0000	4.0000	3.0000

a. Multiple modes exist. The smallest value is shown

Figures 6, 7, 8, & 9: The use of Descriptive Statistics from Raw Data

The Kruskal-Wallis test best analyzes the survey data from both samples. This test is the non-parametric equivalent of the ANOVA (analysis of variance) test (Lomuscio, 2021). It determines if the initial and post-preliminary data responses reflect the same frequencies or have identical medians. In addition, the test considers the following:

Null hypothesis  $H_0$ : There is no statistical difference between the medians of responses regarding 9th-grade female student attitudes and abilities in the four areas of STEM before and after the intervention.

Alternative hypothesis  $H_A$ : The preliminary data differs from the primary data from 9th-grade female students in the four areas of STEM.



Test Statistics <sup>a,b</sup>							
	M1	M2	M3	M4	M5	M6	M7
Kruskal-Wallis H	.431	.004	.002	.129	.363	.309	.735
df	1	1	1	1	1	1	1
Asymp. Sig.	.512	.951	.963	.719	.547	.579	.391

Test Statistics <sup>a,b</sup>							
	M8	M9	S1	S2	S3	S4	S5
Kruskal-Wallis H	.173	.219	.009	.357	1.123	.216	.004
df	1	1	1	1	1	1	1
Asymp. Sig.	.678	.640	.925	.550	.289	.642	.949

Test Statistics <sup>a,b</sup>							
	S6	S7	S8	S9	ET1	ET2	ET3
Kruskal-Wallis H	.045	1.370	1.203	.768	1.486	.848	.084
df	1	1	1	1	1	1	1
Asymp. Sig.	.832	.242	.273	.381	.223	.357	.772

Test Statistics <sup>a,b</sup>							
	ET4	ET5	ET6	ET7	ET8	ET9	
Kruskal-Wallis H	.053	2.112	.642	.308	.076	.334	
df	1	1	1	1	1	1	
Asymp. Sig.	.818	.146	.423	.579	.783	.563	

a. Kruskal Wallis Test  
b. Grouping Variable: PrePost

Figure 10: Kruskal-Wallis Analysis

For the data produced by the Kruskal Wallis Test, we assume a significance level of .05. If the asymptotic significance is less than or equal to .05, the medians between samples are statistically significant, and the null hypothesis is rejected. However, if the value is more significant than .05, the differences between the medians are not statistically significant (*Kruskal-Wallis tests in SPSS*). Therefore, the results for each question are interpreted as follows:

M1:  $H(1) = .431, p = .512$  — No statistical significance  
M2:  $H(1) = .004, p = .951$  — No statistical significance  
M3:  $H(1) = .002, p = .963$  — No statistical significance  
M4:  $H(1) = .129, p = .719$  — No statistical significance  
M5:  $H(1) = .363, p = .547$  — No statistical significance  
M6:  $H(1) = .309, p = .579$  — No statistical significance  
M7:  $H(1) = .735, p = .391$  — No statistical significance  
M8:  $H(1) = .173, p = .678$  — No statistical significance  
M9:  $H(1) = .219, p = .640$  — No statistical significance  
S1:  $H(1) = .009, p = .925$  — No statistical significance  
S2:  $H(1) = .357, p = .550$  — No statistical significance  
S3:  $H(1) = 1.123, p = .289$  — No statistical significance  
S4:  $H(1) = .216, p = .642$  — No statistical significance  
S5:  $H(1) = .004, p = .949$  — No statistical significance  
S6:  $H(1) = .045, p = .832$  — No statistical significance  
S7:  $H(1) = 1.370, p = .242$  — No statistical significance  
S8:  $H(1) = 1.203, p = .273$  — No statistical significance  
S9:  $H(1) = .768, p = .381$  — No statistical significance  
ET1:  $H(1) = 1.486, p = .223$  — No statistical significance  
ET2:  $H(1) = .848, p = .357$  — No statistical significance

ET3:  $H(1) = .084, p = .772$  — No statistical significance  
ET4:  $H(1) = .053, p = .818$  — No statistical significance  
ET5:  $H(1) = 2.112, p = .146$  — No statistical significance  
ET6:  $H(1) = .642, p = .423$  — No statistical significance  
ET7:  $H(1) = .308, p = .579$  — No statistical significance  
ET8:  $H(1) = .076, p = .783$  — No statistical significance  
ET9:  $H(1) = .334, p = .563$  — No statistical significance

After conducting the Kruskal Wallis Test, it is determined that for all responses, the asymptotic significance is greater than or equal to the significance level, .05. This allows the researchers to know there is no statistical difference between the medians from the survey data before and after the intervention. Therefore, the null hypothesis cannot be rejected. Therefore, conducting inferential statistics analysis is highly beneficial when comparing two datasets.

#### d) Correlation Analysis

Data gathered from the 9th-grade female students leads us to assume their abilities and feelings toward math, science, engineering, and technology remain the same. This data can further be interpreted with correlation analysis. Correlation analysis measures the strength of the relationship between variables. A high correlation indicates a strong relationship between the variables. The four areas of STEM are categorized into three groups: math, science, engineering, and technology. The results from the study can be used to determine if there is any connection between students' abilities and attitudes throughout each subject. For

instance, does a student who responds positively to “I like math” also react positively to “I am good at math”?

Correlation analysis can be performed through several methods, the most popular being the Pearson and Spearman correlation. Both ways identify a degree of association between variables. However, the Spearman correlation is a non-parametric test suitable for ordinal data. For this analysis, the Spearman correlation is conducted with two questions simultaneously, ensuring one relates to ability and feelings. The questions will also be from the same subject. Finally, the compared questions have the same perspective, meaning they must be either positive or negative.

Two statements from each subject are compared to determine the correlation between students' attitudes and abilities. For mathematics, “I like

math” (M1) and “I can get good grades in math” (M8) are analyzed. The science questions included are “I am sure of myself when I do science” (S1) and “I would consider a career in science” (S2). Lastly, the questions considered for engineering and technology are “I like to imagine creating new products” (ET1) and “I am good at building and fixing things” (ET3).

Several aspects of the resulting analysis can be used to determine the strength of the association between variables. A correlation coefficient is a number that lies between -1 and +1. A positive correlation coefficient indicates a positive relationship, while a negative correlation coefficient signifies a negative relationship. A value of 0 allows the researchers to know that no connection exists. The significance value is another important attribute, enabling one to understand if the result is statistically significant.

### Correlations

		M1	M8
Spearman's rho	M1	Correlation Coefficient	1.000
		Sig. (2-tailed)	.
		N	55
	M8	Correlation Coefficient	.865**
		Sig. (2-tailed)	<.001
		N	55

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

Figure 11: Spearman's Correlations for Math

The correlation coefficient at the cross-sections of the questions, .865, is essential to note. This denotes a positive relationship between people who like math

and people who can achieve good grades in math. The significance level of <.001 further supports this result.

### Correlations

		S1	S2
Spearman's rho	S1	Correlation Coefficient	1.000
		Sig. (2-tailed)	.
		N	61
	S2	Correlation Coefficient	.926**
		Sig. (2-tailed)	<.001
		N	62

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

Figure 12: Spearman's Correlations for Science

The coefficient of .926 indicates a high positive correlation between students who are sure of themselves in science and would consider a career in science. Once again, the significance level, <.001, supports the correlation.

## Correlations

			ET1	ET3
Spearman's rho	ET1	Correlation Coefficient	1.000	.884**
		Sig. (2-tailed)	.	<.001
		N	60	59
	ET3	Correlation Coefficient	.884**	1.000
		Sig. (2-tailed)	<.001	.
		N	59	60

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

Figure 13: Spearman's Correlations in Engineering

The correlation coefficient, .884, reveals a positive relationship between students who like to imagine creating new products and those who are good at building and fixing things. Once more, the significance level of <.001 agrees with this correlation.

Identifying correlations between variables is crucial for many research problems. For example, assessing this data for correlation allows us to know if a positive relationship exists between the sample students' feelings toward a particular subject and their ability. This leads us to assume that one with positive feelings toward an issue will likely perform well, and students with negative feelings toward a matter presumably do not perform well.

## IV. CONCLUSION

This study aimed to introduce various science-related topics to young, primarily Hispanic female students in a Title I high school. This was accomplished through weekly STEM workshops with the faculty presenters from the College of Education and the College of Arts and Sciences.

*Specific steps included:*

1. The principal and his leadership team identified a purposive sample of 37 9th-grade female students meeting the required demographic characteristics to participate in the study.
2. At the first meeting, students completed the S-STEM. The survey was also conducted at the end of the 15th-week workshop.

Fifteen weekly STEM lessons were scheduled with the ninth-grade female students. Since the ongoing study, researchers have limited S-STEM data and no data from students involved in the project management classes. To analyze the S-STEM data in the most meaningful manner possible, researchers compared the data collected at the beginning of the 9<sup>th</sup>-grade study to that of the end of the project.

Most researchers will agree that a study's validity lies in identifying an appropriate research problem, developing a robust methodology, strict adherence to the methods during implementation,

proper data analysis, and an accurate interpretation of the results. If these guidelines are strictly adhered to, the results of a study are strongly supported.

Studies cannot be invalidated; instead, we must recognize threats to our results' validity and try to control them in the best manner possible. In this case, a sound study was designed and implemented. However, given the ongoing issues in online classrooms and their effect on students, teachers, and administrators, we must continue researching this area.

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# Covid-19 Legacy: Post-Pandemic Qualitative Meta-Analysis on Students' Teacher-Dependency Amongst Master Two Populations in Algeria

By Latifa Sellam

*University of Saida Dr. Tahar Moulay*

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**Keywords:** student's teacher-dependency; post-pandemic; legacy, learning process.

**GJHSS-G Classification:** DDC Code: 614.5 LCC Code: RA644.S17



*Strictly as per the compliance and regulations of:*



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Latifa Sellam

**Abstract** A meta-analytic approach was conducted examined the consequentiality between student-teacher dependency and the pandemic's sequels in Saida, Algeria. The post-covid phase overlapping effects have switched notions, beliefs, and practices orbiting around independence in learning. The present study captures issues underlying dependency. To fulfil its intent, a qualitative method was used. Both questionnaires and interviews were addressed to master two populations; one specialized in the field of didactics, and the other promotion in literature and civilization. The findings suggest that they are entirely teacher-dependent students. They conceive the teacher as the single boosting agent in learning. And that, all of them apprehend the notion of 'independency'.

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## 1. INTRODUCTION

### a) Theoretical Framework

The COVID-19 pandemic and its attached outcomes ramified inauspicious disruption of conventional pedagogical methods. This has compelled teachers and educators to embrace the technological option of the internet-enhanced teaching and learning. Therefore, the shift from face-to-face interaction into screen-to-face of classrooms meetings turns an exciting issue to debate among practitioners and researchers in education. In this respect, online classes offer the flexibility of time and space in teaching and learning (Semedley, 2010). Furthermore, students with different paces of education are well accommodated in terms of time and procedural assignments achievement. In this sense, students' responsibilities made autonomous learning concept very relevant. The clear relevance of online learning mode concerning autonomy following some previous studies.

For instance, (Phan, et al., 2021) gave evidence for how the combination of mobile learning and gamification as part of activities in online learning was successfully able to trigger Vietnamese students' learning autonomy in language teaching classroom. Along the same lines, for (Alpert Sleight, 1997) self-regulation includes the following components: motivation to monitor and control learning, metacognition, cognitive and learning strategies, prior knowledge and mental models to scaffold

understanding, self-efficacy, and last, learner's epistemic beliefs on learning.

Likewise, in an Indonesian context (Dalilan, 2021) captured the students' interest in joining online classes according to what students perceived. The result showed that students viewed online learning as enabled them to learn independently which was manifested through their self-responsibility, self-learning awareness, self-regulation, and self-time management. Nonetheless, learners encountered difficulties in learning regarding their attitude regarding being autonomous and less ready to be so. Unfortunately, teachers and students definition of autonomy remains as simple as learning independently with the absence of a teacher (Augustina, 2017) and (Daflizar, & Petraki, 2022). Conceptually, experts have different perspectives in providing a clear-cut definition to learners' autonomy, which appears to be, at a certain extent, versatile.

For example, (Illés, 2012) view that most of the characteristics attributed to the autonomous learner would merely represent a romantic ideal that does not align with reality. In a paraphrased version, this would be a far-reaching purpose. (Little, 1991) considers autonomy as students' ability to bridge the gap between learning and living. In literal meaning, Little intends to highlight learners' skill to bring and connect what they learn in an academic setting on classroom to the real world. Similarly, other experts for example (O'Reilly, 2014) and (Duarte, Leite, & Mouraz, 2016) agree that learning autonomy positively affects internal motivation so that it can strongly generate students' actions to achieve their goals. Moreover, (Nunan, 2003) proposes a student autonomy definition in a slightly different way by putting learners into five different levels. In the first, called awareness, autonomous learners fully understand what they aim for in their education. Besides, the learning objective, they are also able to identify the best way that suits their learning. At one level higher, a student is called as an autonomous learner.

The population under study underwent some embedded pandemic-related circumstances that tremendously fell over notions about students' engagement in learning. These are manifesting through university work trivialization, and taking for granted determination and hardworking. Thus, self-determination and responsibility are inextricably two significant

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ingredients conducive to academic success, as Little summarizes autonomy by: "the ability to take charge of one's own learning." (Little, 2007:15). Since the estimated regression is alarmingly massive in comparison with the pre-pandemic rate. This implies that almost no effort is deployed, thereby independence. Furthermore, teachers' constant monitoring interwoven with awareness maintenance, appear to be pivotal in front of the advance of retreat threat.

#### b) *Students' Teacher-dependency Origins*

Students' teacher-dependency took shape during the pandemic era. It was noticed that self-reliance in learning belonged to past, and that new practices emerged, altering initiative-taking, self-regulation, and self-time management and so forth. In addition, self-awareness, the notion that seems quite generous in terms of connotations, turns into an old story, when evoking virtual instruction. Synchronous online learning means that learners and instructor are at the same specific time, and synced. Likewise, asynchronous online learning is self-paced learning that enables the students to do the tasks given by the teacher during the given period. Issues interacting with the multifaceted topic of learner-autonomy caught the scholars' attention in worldwide. A priori, curiosity and eagerness to the matter in undergraduate has been shown by (Pasaribo, 2020) who attempted in a class of the English language department to learn autonomy enhancement. All of the studies presented research on this of higher education are hardly found, moreover, student's teacher-dependency as a severe concern has remained largely unexplored.

In addition, the current interest for this issue has been triggered by a flagrant phenomenon stemming from the viral crisis era, which is indolence and reliance on teacher. Keenness to find out was further amplified by colleagues' complaints from the same department, letters and English language, about the inability of the students to be independent in learning. This reality made teaching arduous and unilateral, besides addressing learning loss from the pandemic and the gaps that need to be tackled. This implies that there is still a lot of work ahead in assisting students to catch the delay and, reach adequate academic milestones.

The teaching task is becoming quite challenging and burdensome and miscellaneous concerns about learning and knowledge attainment are put on the back burner, when evoking the post-pandemic phase. A priori, the distracting circumstances generated by the outbreak have eaten away some learners' language proficiency, aptness and, good practices, all along with the accompanying drawbacks such as passiveness, lack of responsiveness, and retreat. Lustiness and self-responsibility belonged to the past hereafter, because most students rely heavily on teachers, i.e. absence of course enrichment enterprise,

no inventiveness, or creativity. Eventually, from those mentioned before, there will be a shortage in terms of learning returns and poor yields.

#### c) *In Parallel Avenues Relevant to Dependency*

Issues in relevance to learning independently are several, and all of them culminate in involving engagement, achievement, internalizing, and externalizing. The first one deals with the motivational as well as behavioral ability investment in the learning process. It is sad to say, however, that the populations under study did not show the least keenness in doing so. The second, is about academic accomplishment which refers to the learner's performance outcomes as an indicator of fulfillment of specific goals. The participants were demonstrating mediocre results, far from what was expected. The third, refers to retention and retrieval abilities; in fact internalization is the basis for production. In this sense, problems in recalling and reproducing input amongst subjects were recurrently noticed, due to the lack of course belonging. The fourth consists of faculty of treating issues as separate entities, i.e. the learning target is to comprehend an information structure via creating an interactive environment to operate.

## II. METHODOLOGY

The objective of this research is to report and analyze the array of factors contributing to students' teacher dependency. Hence, this study has chosen the following correlational research questions: 1- To what extent did the pandemic impact students' teacher dependency? 2- Are students' learning practices and beliefs significantly shifting between pre-and post-pandemic i.e., from independent or half-dependent to entirely dependent? Are we encountering students' teacher-independence decline? Fifty master two students were the core of this study. They have experienced the pandemic for three years long, concomitantly, being exposed to hybrid-blended instruction, except for the current year. Seemingly, those promotions allow us to see in life-size learning behavior, through the lens of the post-pandemic phase. Accordingly, it was noticeable that they were externalizing new forms in handling knowledge and exhibiting novel conceptions with regard to cognition attainment and harnessing abilities. In this respect, gender was not significant in this research, since reactions and reflections were quite similar; what accounted however was to highlight motives behind this joint let it all hang out.

The questionnaire ascertained the assumptions about what was observed with relevance to absence of lustiness and awareness in taking charge of one's learning. It was dispatched at the end of the first semester of the current year, as it comprised three sections. Each section encompassed three questions,

and the last was open-ended. Therefore, the thematic framework was figuring out approaches in learning; in parallel, to find out if they consider or not independency as an ideology at this level of instruction.

Besides, a semi-structured interview was administered. It provided an opportunity to converse with some randomly chosen students and elicit the shared mentality that reigned amidst the outbreak. We mean here by mentality, the collective perceptions and understanding when it comes to learning independently. Those turned beliefs and attitudes that we are currently witnessing. Rupture with the old practices, and the good old way of thinking and reasons why dependency has increased as much, were the central themes of this interview. All in all, the process helped to deepen the data collected via questionnaire. This inquiry was exploratory in nature, seeking to provide understanding of learners' teacher dependency rather than extrapolate findings to other contexts. It is hoped that the yielded results will increase our knowledge of the phenomenon under investigation.

### III. QUESTIONNAIRE QUANTITATIVE REVELATIONS

The questionnaire revealed the following data numerically expressed. It was reported that respondents view the following:

- Teacher is a boosting agent 90%;
- Hardworking is a fostering factor 90%;
- No extra research done weekly 100%;
- Relying heavily on courses contents 100%;
- Depending on teacher's input 95%;
- Most of them are extrinsically motivated 95%;
- All of them apprehend independency 100%;
- Dependent learners can never reach the desired competence 95%;
- Discipline forges independency 95%;
- Positivity, intrinsic motivation and self-regulation shape autonomy by 55%.

### IV. FINDINGS & RESULTS

Besides quantitative findings, the results suggest the following intermingled considerations regarding participants' perceptions and stances:

- a) *Extrinsically motivated:* They rely on the teacher's constant urge and push. Generally, extrinsic motivators or motivating agents are few, for instance, parental motivation, then comes the instructors' one. Motivation emanating from the external environment operates as a boost, should be concomitantly accompanying the education process. Concerning the outcomes of this type are ungenerous, since it is environment-directed; and this, is what we are actually noticing. In contrast to

intrinsically motivated learners, who take their willpower and determination from an inner motive. Eventually, the numerical results show that extrinsically motivated students greatly outnumber intrinsically motivated ones.

- b) *Teacher's-input dependent:* According to their answers, they are entirely dependent to the teacher's input; this implies that course contents is the only reference. They confirmed by adding that no further reading or research making are undertaken weekly. It is worth mentioning here, that, teachers welcome extra information, encompassing metacognition, in considering assessment approaches according to the formative mode (Thrumbull & Lash, 2013). The goal is to improve learning, not to apply final marks. The summative aspect wraps students' acquisition and learning rates as well as achievement, at the end of the instructional period i.e. semester, besides tests.
- c) *Absence of Hardworking:* Another point underlying dependency in learning is that they do not attribute much attention to hardworking and diligence. This philosophy is relatively cohort; they are economical when making efforts. Contrastively, in the pre-pandemic past years, we had six to seven hard workers per promotion, but unfortunately, nowadays, we have one to two who are truly conscientious. This leads to say that, the minimum for success might be a passing grade for majority, but a high distinction for others. Consequently, they are subject to enduring heavy episodic failure. This particular variation supports (Kahu & Nelson's, 2017) concept of an individual interface, where all aspects of the student experience, including perceptions of success, are a dynamic interaction between institution and student. They are supposed to meet university standards and requirements. Unsurprisingly, the meager percentage, representing diligent students, conceive that discipline forges autonomy. Since, the prevailing view of student's success focuses on measures of academic achievement, student retention and, qualification completion (York et al., 2015). In other words, unconscientious learners need a quantum leap to join the other camp.

### V. DISCUSSION

A priori, the pandemic has generated disproportionately two distinct gatherings. The first, which is predominant, encompasses learners' teacher-dependent, obviously noticed, unfortunately representing the overwhelming majority quantified by 98%. The second gathers a minority of 02 %, alongside, of potential effects related, without exaggeration, to the upheaval amid the outbreak. Seemingly, blinded-hybrid learning has prepared a fertile soil for the germination of



learning retreat and exacerbated mechanics lacunae; these are undoubtedly paramount for an EFL learner who is supposed to possess basics of the target language, and that would spell doom for any future aspirations.

Among dependency traits, apprehension of writing. This means that, the subjects are afraid of being face-to-face with their spelling, grammar, and syntax, in short, terrorized by mistakes. This has been ratified by the lack of practice, resulting from the pandemic era. The increasing phenomenon of dependency is two-faceted. The first facet is teacher dependency, and the second is online-instruction dependency. As mentioned earlier, they have been exposed during three years long to virtual learning and its drawbacks, among those limitations, resides passiveness, accompanying language reception. Thence, the notion electronic learning is regrettably associated with readiness and effortless attainment of knowledge, dismissing any attempt of improvement or enrichment. Eventually, the complex phenomenon, called double-sided dependency stemming from the previous era is characterized by no willingness to sharpen one's skill with regard to language items reinforcement or disciplinary empowering.

Further, dependency may operate as a hurdle for the fulfillment of learners' basic need for autonomy i.e., being able to make their own choices and act independently from the teacher. According to self-determination theory (Deci et al., 1991), this need for autonomy is essential for students' engagement with schoolwork and broader school environment. Likewise, the beginning of the students' development as self-regulated learners: 'metacognitively, motivationally, behaviorally active participants in their own learning process' (Zimmerman, 1989:329) and those are determining factors of a successful autonomous student.

Similarly, a significant result has been articulated, that most learners remain dependent on teachers to a large extent. Since they tend to be incapable of setting goals, regulating, evaluating, and making reflection on their learning. This fact is not only admitted by them, but also articulated by their teachers. In other words, teachers view them as being constant spoon-fed individuals, and getting acquainted to; actually, spoon-feeding is literally accentuating in the post-pandemic period; and that, they should no longer be so. This reality, is deemed choking, and accepted without bargain.

Moreover, the total number of the participants feel uneasiness with regard to the notion of 'independency', because this is synonymous to massive effort deployment, and concessions to make at the expense of leisure. However, this stands against endeavor economy, making decisions about learning needs; in the meanwhile, understanding individual

learning styles, and promoting thinking as well as problem-solving. In short, what seems significant and remedial, is helping them in scaffolding their learning, keeping track, and monitoring progress.

## VI. CONCLUSION & RECOMMENDATIONS

The ongoing aftermath of the pandemic is still inspiring academics to cover at a greater distance the viral crisis spectrum. Educators and university teachers are striving with loss, concomitantly hitting dependency question that further exacerbates the teaching duty. Teachers should be responsabilizing students more, and this, by getting them engaged fully in the enrolment of the course, thus, in the learning process. Side-by-side with controlled assignment, all along with dissuasive strategies, which are highly recommended, with regard to research misconduct. Furthermore, instructors ought to boost, if existing, or nurture learner-centeredness.

A kit-build approach then should be inserted to offer students multiple approaches to commit to, and assist them in operating. For instance, applying the incentive theory of motivation (Indeed Editorial Team, 2020), is a behavioral theory suggesting that individuals can be stimulated by a drive; as it advocates that people behave in the way they believe will result in a reward. Therefore, the reward might be an academic success in education, or a promotion or raise in workplaces. Correspondingly, incentives, or stimuli can be categorized into two, positive and negative. First, positive incentives comprise recognition, promotions, raises and so forth. Second, negative incentives revolve around correcting mistakes, discouraging certain behaviors, or imposing penalties. In short, receiving positive incentives promotes working hard and, remaining dedicated to the task being performed.

In parallel, teachers need to create a learning environment leading to autonomy, where the learners can excise their agency in learning, which should become a major target in a course design (Ribbe & Bezanilla, 2013). Moreover, we should imbue university students with a sense of responsibility. We can achieve this, by injecting them with dose-by-dose leadership inoculation, throughout the instructive operation; and this, is in line with the learner's centeredness approach in learning. Regrettably, we will endure the changes stemming from the experienced extraordinary context, and its long-term impacts. We hope to have contributed to the existent body of knowledge, and emphasized on the mere avenues related to student's teacher-dependency. Ultimately, more complex analyses, are now required to tease out this pressing massive concern.

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## A Post-Intentional Phenomenological Study of a Queer Identified Youth in Jamaica

By Keitha-Gail Martin-Kerr

**Abstract-** The paper provides an exploration of glimpses into the life of a Jamaican woman who loves women. The research question this paper examines is how societal homonegativity shapes the lived experiences of a young woman who loves women in Jamaica. Post-intentional phenomenology methodology was used to capture salient moments of the woman's life through written memory, song lyrics, and artifacts. Results suggested that fear, hope, care, and being perceived as diseased are a daily part of a woman who loves women's life. There is a need to tell the stories of women who love in Jamaica to validate their lived experiences and to construct a body of knowledge on this topic. Implications for this study can be used to mobilize education research, community, and support for students with female same-sex caregivers.

**Keywords:** same-sex, jamaica, women, lived experience, phenomenology.

**GJHSS-G Classification:** DDC Classification: 305.48



*Strictly as per the compliance and regulations of:*





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**Abstract-** The paper provides an exploration of glimpses into the life of a Jamaican woman who loves women. The research question this paper examines is how societal homonegativity shapes the lived experiences of a young woman who loves women in Jamaica. Post-intentional phenomenology methodology was used to capture salient moments of the woman's life through written memory, song lyrics, and artifacts. Results suggested that fear, hope, care, and being perceived as diseased are a daily part of a woman who loves women's life. There is a need to tell the stories of women who love in Jamaica to validate their lived experiences and to construct a body of knowledge on this topic. Implications for this study can be used to mobilize education research, community, and support for students with female same-sex caregivers.

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## 1. INTRODUCTION

Jamaica's youth who choose to move against the grain of heterosexuality have been cast to the outskirts of society. They do not have a voice in public discourse. If they try to use their voices, they run the risk of being shut down or killed because of their sexual orientation or their non-gendered ways of being. Excluding these youths from society is a major problem that needs to be taken up because of the ill effects it leaves on the youths and also on society at large. As a practicing democratic country, all voices should be heard and respected whether society agrees with these opinions and ways of being. When non-heterosexual and non-gender conforming youths are ostracized from society, society stands to lose the intellect and knowledge that can be gained from these lost voices. No one benefits when non-gender-conforming youths are forced into silence and pushed to the fringes of society.

The research shared in this chapter is taken from a larger body of work that I conducted in Jamaica between 2015 and 2016. Not much has changed in Jamaica since that time that has given any rights to youths who identified as non-heterosexual and non-gender conforming. Discrimination and hatred still permeate the culture as it relates to those who transgress from societal norms of choosing to live as male or female and deciding not to be with someone from the opposite sex.

I was born in Jamaica in the 1970s. I did my schooling in Jamaica up to my first degree, which I got in education. Throughout my years of education in Jamaica, I never saw non-gender conforming people represented in the formal curriculum in school nor in the informal curriculum of life that people are engaged in daily. I migrated to the United States in the early 2000s and returned home to Jamaica in the latter part of 2015 and early 2016 to collect data for my research. In 2016, I was 40 years old. Being 40 years old did not give me the right to try to have a conversation with my family or friends about the lived experiences of people who are non-heterosexual. Being educated did not give me that right either. I state this simply to point out that conversations like these are not welcomed in the culture, irrespective of age, gender, or educational status.

Jamaica is known as the land of milk and honey and is simultaneously known as one of the most homophobic countries in the world. With the juxtaposition of beautiful sun-kissed beaches, Jamaica also has a dark side of jungle justice, murder, criminalization, and discrimination of non-heterosexual people. It shows that something or someone is never all good, and on the flip side, something or someone is never all bad. Everything has a balance. Similarly, everyone has a balance. No one is all good or all evil. It would be reasonable to acknowledge that youths who identify as non-heterosexual or non-gender conforming are not bad nor evil. They are people whose sexual orientation is different from the cultural norm and people who do not have a voice in society. They are also people who have been discriminated against and are forced to live on the periphery of society. It is society that makes things like daily living horrific for non-heterosexual youths; it is not that these youths are horrific. Many LGBTQI people are forced to take their place in society not because that is the place they deserve or would choose but because that's where society believes that they belong only because of their sexual orientation.

How can we move toward engaging in tension-filled conversations around issues relating to LGBTQI? How might we open ourselves up to listen to and respect the lived experiences of people whose sexual orientations are different from ours? What might we learn when we hear the stories from non-gender-conforming individuals? Why is there a need to silence and other the

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voices of LGBTQI youths? These are some of the questions that I wrestle with when I think about my country, Jamaica, and the Caribbean as a whole.

As a phenomenologist, I stop to look at the things that people typically would not look at. I am interested in understanding and then describing LGBTQI people's lived experiences. I am also curious about the lives of people; therefore, as a phenomenologist, I ask questions to interrogate and get a glimpse into the way individuals live and operate. Another thing I do as a phenomenologist is to focus on the phenomena. I try to capture glimpses of phenomena as it is being lived out in real life. I am curious to understand what it might be like to live in a homonegative society as a woman that loves women. I will never get to the essence of these phenomena because phenomena are always moving and never stable. My hope is to record flashes and glances of the phenomena as it bubbles up in the data.

In this chapter, I focus on one participant from my research. I choose to zoom in on Tracy, a young woman who loves women. There are a few studies out of Jamaica and the Caribbean that center on homosexuality; however, to this date, only one study that I am aware of focuses solely on women-who-love-women in Jamaica (Martin-Kerr, 2016). My goal is to shine a light on the daily lives of women who love women and share what it is like to live on one of the most beautiful islands in the world, one of the most homophobic places to reside. Hence, my research question is how does societal homonegativity shape the lived experiences of a young woman-who-loves-women in Jamaica? Below, I share a brief literature review from the Caribbean and a few African countries with published empirical peer-reviewed studies that center people in same-sex relationships.

## II. REVIEW OF THE LITERATURE

I included a total of 19 empirical studies in this review of the literature. Publication dates ranged from 1996 to 2015. Eight of the studies were conducted in Jamaica. Four of the studies were from other Caribbean islands, namely: Curacao, Guyana, and Suriname, and two were conducted in Barbados. Three of the studies compared Jamaica with first-world countries. Three studies from the continent of Africa were included in this literature review, namely: South Africa and Namibia, to extend the geographic phenomena of this issue.

The review of the literature included geographic regions where same sex-same relationships are legal and other studies where this relationship is illegal. Same-sex relationships are illegal in Jamaica, Barbados, Guyana, and Namibia. Same-sex relationships are legal in Curacao, Suriname, and South Africa. The only country I reviewed that has anti-discriminatory laws to protect same-sex couples is South Africa. Regardless of the legality or the illegality of same-sex relationships in

these geographic regions, homonegativity is pervasive in all these regions. Meaning policies are not enough to rid society of homonegative behaviors.

Researchers investigate a range of topics related to the societal homonegativity that exists in colonized countries. Six of the studies investigated perceptions and prejudices towards same-sex relationships (Boxill, Martin, Russell, Walker, Meike, & Mitchell, 2011; Boxill, Galbraith, Mitchell, & Russell, 2012; West & Hewstone, 2012a; West & Hewstone, 2012b; Gromer, Campbell, Gormory, & Maynard, 2013; West & Cowell, 2014). Five studies examined gender and sexuality (Peake & Trotz, 1999; Graziano, 2004; Anderson-Levy, 2008; Gunkel, 2009; Kempadoo, 2009). Another five studies examined public discourse and policies towards<sup>1</sup> homosexuals (Currier, 2010; Charles, 2011; Cowell & Saunders, 2011; Cowell, 2011; Jackson, 2015). Two focused on the unheard voices of women who love women in the Caribbean (Clemencia, 1996; Wekker, 2006). One study examined health-related issues (White & Carr, 2005). The 19 studies investigated a range of topics related to societal homonegativity; however, only two focused specifically on women's lives, hence my interest in women who love women. Homonegativity is bred by inherited formal and informal ways of beings; below, I explain these formal and informal ways encultured in our society.

### a) *Formal Ways of Operating*

The formal legacy that has been inherited from colonization was documented in more than half of the 19 studies was the law that criminalizes homosexuals (Peake & Trotz, 1999; Anderson-Levy, 2008; Kempadoo, 2009; Currier, 2010; Charles, 2011; Cowell & Saunders, 2011; West & Hewstone, 2012a; West & Cowell, 2014; Jackson, 2015). The *Offenses Against the Person Act*, the law against homosexuality, was the basis of the introduction of Cowell and Saunders' (2011) paper. These researchers briefly discussed the consequences of this law on the local level and international levels, describing how it negatively affects the Jamaican economy and the livelihood of the Jamaican people. They addressed how the enactment of the law not only punishes individuals who are homosexuals but also had negative implications for the country in the international arena. For example, because of the law, gay cruise ships are prohibited on the island.

Homosexuality is still a criminal act in many countries colonized by Britain. These countries inherited the *Offenses against the Person Act* (1864) Sections 76 and 77, which reads:

<sup>1</sup> In this paper, the word homosexual is used at times to refer to both gays and lesbians.

*Unnatural Offences*

77. Whosoever shall be convicted of the abominable crime of buggery, committed either within mankind or with any animal, shall be liable to be imprisoned and kept to hard labor for a term not exceeding ten years.
78. Whosoever shall attempt to commit the said abominable crime or shall be guilty of any assault with intent to commit the same, or of any indecent assault upon any male person, shall be guilty of a misdemeanor, and being convicted thereof, shall be liable to be imprisoned for a term not exceeding seven years with or without hard labor (Ministry of Justice, Jamaica, 2010).

The law states that homosexuality is an unnatural act. For something to be unnatural, it has to be compared to something else that is deemed natural. If homosexuality is unnatural, the opposite of homosexuality is heterosexuality, which is deemed natural. Not only is homosexuality positioned as unnatural, the use of the word 'abominable crime' places homosexuality as a monstrous, repulsive crime. Even though this law is more than 150 years old, it is still in effect and punishable for up to 10 years in prison in many countries that were colonized by Britain.

To predict prejudice against gays and lesbians, West and Cowell (2014) included four items in their survey that directly relate to the law:

1. Marriage between homosexual individuals is acceptable (reversed)
2. Society should recognize homosexuality as normal (reversed)
3. Homosexual behaviors should be against the law
4. Organizations that promote homosexual rights are unnecessary (West & Cowell, 2014 p. 4).

The language of the survey items reflects the law that was inherited. West and Cowell (2014) challenged the law in the implications section of their research as one of the ways to reduce prejudice against gays and lesbians. They argue that if the law is receded, then there will be less prejudice against gays and lesbians in Jamaica.

Similarly, in their study West and Hewstone (2012a) used the law to theorize sexual prejudice because the law is what people use to criminalize and discriminate against non-heterosexuals on the island. Additionally, Charles (2011) theorized that the law that was inherited has given law enforcement officers the assumed right to brutalize gays and lesbians and to condone the behavior of those who incite violence against gays and lesbians. In his theorizing, Charles alluded that the law makes it challenging for health workers to provide services to homosexuals since homosexuality is against the law.

Some of the countries that were colonized have repealed the *Offenses Against the Person Act*. Even

though homosexuality is decriminalized, some of these countries are still operating under a colonial mentality in formalized ways (Clemencia, 1996; Currier, 2010). For example, homosexuality is legal in Curacao and Suriname; however, there are no anti-discriminatory laws to protect people who are gays and lesbians. Clemencia's study of women-who-love-women in Curacao illustrates this point when an interviewee states, "Only yesterday I learned that one of the earlier mentioned women lost her job at the local industry because the management did not think it appropriate to have a lesbian working in the place" (Clemencia, 1996, p. 84). This example shows that lesbians are discriminated against, even though homosexuality is legal in Curacao. This discrimination against lesbians and gays is an example of the continuing influence of colonial beliefs, as illustrated in the *Offenses Against the Person Act Law*.

Five of the 19 studies documented how government leaders uphold the law in public forums. Charles (2011) refers to the government backing of the law as "state-sponsored-homophobia" (p. 12). This means that the state's leaders use their authority to ensure that the law is enforced in structural ways. An example of this was illustrated in Currier's study in Namibia. During a police graduation ceremony, the Minister of Home Affairs called for police officers to "eliminate" gays and lesbians in Namibia (Currier, 2010, p. 120). In a similar situation, a former Prime Minister of Jamaica publicly stated on international television that he did not want any gays or lesbians as members of his parliament (Cowell, 2011; West & Hewstone 2012a; West & Cowell, 2014). These studies illustrate that government leaders contribute to the institutionalized behaviors inherited from colonization.

#### b) *Informal Ways of Operating*

The studies I reviewed from the literature documented various ways the legacy of colonization is lived out in informal ways. Some of the informal ways of being that have been inherited from the period of colonization have been operationalized through religiosity, music, heteronormative values, and discrimination against gays and lesbians at the intersection of race and class. In the following sections, I discuss how these informal ways of being have been documented in the research.

##### i. *Religiosity*

Most studies cited religiosity as a way of being inherited from colonization and used to discriminate against lesbians and gays (Charles, 2011; Cowell, 2011; Cowell & Saunders, 2011; West & Hewstone, 2012; West & Cowell, 2014). For example, West and Cowell (2014) investigated predictors of prejudice against homosexuals in Jamaica and concluded that most opponents of gays and lesbians pointed to Christianity as their motivation. Participants in their study considered

homosexuality to be a sinful, abominable act. Interestingly, West and Cowell reported that religiosity predicted negative attitudes toward gays and lesbians. However, in some cases, religiosity also predicted less negative behaviors towards gays and lesbians. This may sound paradoxical. It is a situation where Christian leaders urge their followers to “love the sinner and hate the sin” (West & Cowell, 2014, p. 7). The sinner would be the homosexual or the lesbian. The sin would be the act of homosexuality. Christians, in their effort to perpetuate a colonized mentality to convert others to Christianity, profess to love the sinner and hate the sin (West & Cowell, 2014). Similarly, Jackson (2015) stated that converting people to Christianity conjures up colonial imagery and the prominent role of religion in colonization.

#### ii. *Music*

Several studies documented that Jamaica's dancehall music includes homophobic lyrics (Charles, 2011; Cowell, 2011; West & Hewstone, 2012; West & Cowell 2014). Charles (2011) discussed the violence and abuse that are encountered by homosexuals in Jamaica. He analyzed three lyrics from popular dancehall artists: Boom Bye Bye by Buju Banton, Chi Chi Man by TOK, and Log On by Elephant Man. He concluded that the lyrics of these songs imply that gays and lesbians should be annihilated. Similarly, West and Hewstone (2012) referred to Jamaican dancehall music as ‘murder music’ and ‘gay bashing music.’ In their research, Cowell and Saunders (2011) quoted one renowned Jamaican dancehall singer, Shabba Ranks, who insisted that if one goes against the law of God, that person should be crucified. Here Shabba Ranks is insinuating that homosexuals and lesbians deserve to die because they transgress the laws of God. Charles (2011) stated that Jamaican dancehall music targets gays and lesbians as people who should be eliminated from society because of the colonization of the British through their teachings of Christianity. It is important to note that only studies done in Jamaica cited music as a way to perpetuate homonegativity.

#### iii. *Heteronormativity*

From the investigation of heteronormativity in public discourse, Cowell and Saunders (2011) stated that the Caribbean attitude is homonegative in general, and homonegativity is rooted in heteronormativity<sup>2</sup>. They concluded from their research that the public discourse settled a heteronormative value system inherited through colonization. Similarly, Kempadoo (2009), in her study of how sexuality is expressed and practiced in the

Caribbean, found that Caribbean sexuality is rigidly heterosexual and intolerant of sexual differences. She stated, “The dominant, almost unquestioned, links between sexuality and gender are lodged in the norm of heterosexuality as normal” (Kempadoo, 2009, p. 10). Similar to Kempadoo, Charles (2011) stated, “Jamaica is a heteronormative place where heterosexuality exercises hegemonic control over homosexual presence” (Charles, 2011, p. 15). West and Cowell (2014), in their study of the prejudice and predictors of gays and lesbians in Jamaica, asserted that the entrenched heteronormative value they found in Jamaican society is rooted in colonization. These studies suggest that heteronormativity derives from the historic agreement passed down by previous generations.

#### iv. *Discrimination Against Gays and Lesbians at the Intersection of Race and Class*

Several of the studies in the literature reviewed mentioned that the discrimination against gays and lesbians is layered and rooted in the colonial mentality of discrimination against people of darker skin color and lower economic levels. In the study of the representation of homosexuality in Jamaica, Charles (2011) theorized that the complexities of race and class relate to homophobic behaviors in Jamaica. He states, “The negative representation of homosexuality varies based on skin color, gender, social class, and geographic location” (p. 23). This implies that darker-skinned, lower socioeconomic-status homosexuals who live in rural areas experience more discrimination than lighter-skinned homosexuals, middle- and upper-economic-status homosexuals who live in urban areas.

In his study, Jackson (2015) asked a participant if it is more permissible for lighter skin-tone Jamaicans and visitors to the island to be gay or lesbian, and the participant responded,

Ya, it is more permissible for uptown white Jamaicans. It is more permissible for Jamaicans who tend to be light-skinned. Ya, Jamaican people don't do that's not a thing that Jamaican people do, but uptown and light-skinned and tourists they can do that because they are foreign-minded (Jackson, 2015, p. 235).

This participant in Jackson's study illustrates the complex ways in which race and class affect one's view of homosexuality. The participant implies that light-skinned Jamaicans are not ‘real’ Jamaican because real Jamaicans are Black people or people of a dark complexion. Therefore, light-skinned Jamaicans are not real Jamaicans, and they are not discriminated against as much as real Jamaicans are. This participant also mentions that homosexuality is permissible for light-skinned Jamaicans who live uptown. The reference to uptown usually signifies someone from an upper middle class or an upper-class status. These two studies (Charles, 2011 & Jackson 2015) highlight that the

<sup>2</sup> Heteronormativity “refers to the institutionalization of heterosexuality and heterosexual valued in a society imbuing them with high degree of moral rectitude and as corollary rejecting divergent outlooks” (Cowell and Saunders, 2011, p. 317).



discrimination that gays and lesbians face is rooted in the colonized mentality of race and class, where the lighter-skinned and upper-class person faces less discrimination as compared to the darker-skinned and lower economic class person.

The intolerance for homosexuals and gays is a product of historical forces (Charles, 2011). Some of these historical forces manifest in formal ways, such as the *Offenses Against the People Act* law that penalizes homosexuals for a maximum of 10 years, and also the actions and words of government leaders. Apart from these formal ways, the legacy of colonization is still lived out in informal ways through religiosity, music, heteronormative values, and discrimination at the intersection of race and class.

Comparing the studies that took place in Jamaica to the studies that took place in other countries, Jamaica is the only setting where music was reported as upholding the hegemony of heteronormativity. Similar to Jamaica, other countries reported that homonegativity was perpetuated through the *Offenses Against the People Act* law, Christianity, and heteronormativity as the legacy of colonization.

### III. METHODOLOGY

For this research, I used post-intentional phenomenology (Vagle, 2014) to capture glances of how societal homonegativity shapes the lived experiences of a young woman who loves women in Jamaica. I was interested in exploring the tentative manifestations of the phenomena of societal homonegativity on the lived experiences of a woman who loves women.

Since 2010, Vagle has helped others to see phenomenology in new ways. He was trying to see the phenomenon for what it is becoming. Vagle asserted that in post-intentional phenomenology, "intended meanings are always in the process of becoming" (Vagle, 2014, p. 41); therefore, intended meanings are generative. In other words, in post-intentional phenomenology, meanings are "multiple, partial, and fleeting" (Vagle, 2014, p. 41). Simply stated, a phenomenon can have several meanings, and it is never static.

Post-intentional phenomenologists want to understand how things are experienced in multiple ways. In this study, I tried to understand and theorize the various ways things manifest and appear in and through the phenomena that I studied.

For crafting a post-intentional phenomenology study, Vagle (2014) outlined a five-component process: Identify a phenomenon in its multiple, partial, and varied contexts.

1. Devise a clear, yet flexible process for gathering data appropriate for the phenomenon under investigation.

2. Make a post-reflexive plan.
3. Read and write your way through your data in a systematic, responsive manner.
4. Craft a text that captures tentative manifestations of the phenomenon in its multiple, partial, and varied contexts (p. 121).

For the research methodology, I followed these steps - weaving in and out of them in a nonlinear fashion - as I worked my way through data collection, analysis, results, and implication of the phenomenon of how societal homonegativity shapes the lived experiences of Tracy, a young woman who loves women.

1. Identify a Phenomenon in its Multiple, Partial, and Varied Contexts.

The first component consisted of six elements that lay the groundwork for a post-intentional phenomenology study. Vagle outlined the following elements:

- 1.1. State the research problem,
- 2.1. Conduct a partial review of the literature,
- 3.1. Write a philosophical claim that relates to the research problem,
- 4.1. State the research questions,
- 5.1. Situate the phenomena in varied contexts,
- 6.1. Identify research participants (Vagle, 2014, p. 122).
2. Devise a clear yet flexible process for gathering data appropriate for the phenomenon under investigation.

This process required me to select data sources and align data sources with the research question. The data sources that I used were Tracy's written memory, semi-structured interviews, artifacts such as Jamaican Dancehall music, and my post-reflexion journal.

3. Make a post-reflexive plan.

A post-reflexive plan is used as a guide for the researcher to interrogate prior beliefs and assumptions, as well as interpretation of data in an effort to explicate the phenomenon (Vagle, 2014). Post-reflexivity encourages the researcher to think through ways the researcher and the research are always in an intentional relationship with each other (Vagle, 2014). Vagle (2014) suggested the post reflexive writing should contain four levels of post-reflexivity:

- a) Moments when the researcher instinctively connects with what he/she/ze observes and moments in which he/she/ze instinctively disconnects,
- b) My assumptions of normality,
- c) Bottom lines, those beliefs that the researcher refuses to give up, and
- d) Moments in which the researcher is shocked (Vagle, 2014, p. 132).

I identify as a woman who loves women. I live with my partner and our daughter in America. Therefore,

I wrote in my post-reflexive journal at the beginning and throughout the duration of the study. I wrote an initial post-reflexive statement that explained the beliefs, histories, and theories that framed my perspectives as a woman who loves women. I used my post-reflexive journal as a data source. My post-reflexive journal entries allowed me to uncover my bias and prejudices as I moved through the research process. The entries in my post-reflexive journal contained wonderings, assumptions, bottom-line, and moments when I was shocked. These entries were a source of data as they helped to examine how I was framing what I was seeing.

4. Read and write your way through your data in a systematic, responsive manner.

I read and wrote my way through the data in a systematic manner to capture tentative manifestations of the phenomenon of how societal homonegativity shapes the lived experiences of Tracy, a young woman who loves women in Jamaica. I explored this phenomenon in its varied, partial, and fleeting ways. I adhered to this process at the time of data analysis by using two types of systematic analysis to make meaning of the data that I collected. The analyses that I used were collective memory work (Haug, 1987) and thinking with theory (Jackson and Mazzei, 2012).

5. Craft a text that captures tentative manifestations of the phenomenon and its multiple, partial, and varied contexts.

I used traditional and non-traditional types of writing to show how the phenomenon of women who love women in Jamaica is lived out in multiple ways. For non-traditional forms of writing, I used stories, song lyrics, and poems to capture glimpses of the phenomenon. I hope I write in such a manner that allows the readers to get a vivid image of Tracy's, my participant's, intentional relationship with the phenomenon.

#### IV. RESULTS

The data collected showed tentative manifestations of the phenomena - how does societal homonegativity shape the lived experiences of Tracy, a young woman who identifies as a woman who loves women. I asked Tracy to zoom in and write about a moment when she had to hide her love for women.

Below is Tracy's written memory.

*One specific moment when I had to hide my love for women was when I was much younger... just left college and my now ex-boyfriend and I we're having problems...he's someone my mom loved a lot and I think it's because he was the reason she thought I was not gay as she later revealed that same day. I came to her and my sister to talk about the issues I was having with my now ex-boyfriend and we all had a good conversation about it and laughed and I made a comment to my mom saying "know you not gonna say nothing bad about him" to which she replied "no don't say*

*that... if he is wrong, he is wrong, but I do love seeing you with that boy because for a long time I thought you were gonna be a lesbian" and my sister joined in and agreed that she too thought I was gonna be a lesbian. For a moment I just stopped and looked at them in complete shock and as I was about to take brave heart and say so what if I am...my mom just gave out "mi nuh want nuh homosexuals or HIV people around mi" and I can't forget how disgusted she looked as she said it... I had to pause then burst out into laughing and try not to look guilty by saying to them that I'm not into those things I'm just a tomboy because I grew up rough with all the boys. At that point I realized that telling my family how I felt about women emotionally and sexually is gonna be a real challenge.*

##### i. Fear

Fear was one phenomenon that tentatively manifested in Tracy's memory. After Tracy's mom and sister told her that they thought she was a lesbian, she wrote, "I was about to take brave heart and say so what if I am..." This showed that Tracy was afraid of telling her mom and her sister that she is a woman who loves women. The phrase "take brave heart" could mean that Tracy was trying to be brave at the moment; however, she could not muster the courage to tell her mom and her sister that she is a woman who loves women.

In Tracy's story, she was not the only one who showed fear; her mom and sister showed signs of fear. Tracy's fear was telling her mom and her sister that she is a woman who loves women. Her mom and her sister feared that Tracy is a woman who loves women. This was evident in the story when Tracy wrote that her mom loved her ex-boyfriend a lot "...because he was the reason she thought I was not gay." Later in the story, Tracy quoted her mom, who stated, "I do love seeing you with that guy; for a long time, I thought you were gonna be a lesbian." At that moment in the story, Tracy's sister joined in the conversation and stated that she, too, thought that Tracy would be a lesbian. In the story, the mom and the sister expressed a sense of fear for Tracy being a lesbian. The mom even went so far as to say, "me nuh wan nuh homosexual and HIV people around mi." In this sentence, the mom showed fear of homosexuals because she associates homosexuality with a disease (HIV). Homosexuality is closely linked with HIV, which is a disease that Tracy's mom feared.

##### ii. Care

Care manifested in Tracy's written memory. In Tracy's written memory, care was evident in the way she interacted with her mom and her sister. Care was noticeable in the story when Tracy went to her mom and her sister to talk about the problems she was having with her ex-boyfriend. Tracy wrote, "I came to her and my sister to talk about the issues I was having with my now ex-boyfriend, and we all had a good conversation about it and laughed..." The interaction between Tracy, her mom, and her sister revealed they cared about each other. Tracy probably knew that her mom and her sister

would care to hear about her problems; therefore, she went to them and discussed her issues with them.

As the story continued, Tracy cared what her mom had to say about her ex-boyfriend. After she explained everything the ex-boyfriend did to her, she cared about the mom's opinion of the ex-boyfriend. Therefore, she asked her mom, "know you not gonna say nothing bad about him?" The mom responded that she cared that Tracy had a boyfriend. And she cared about what people would think of Tracy if Tracy did not have a boyfriend. The mom showed this by stating, "If he (the boyfriend) is wrong, he is wrong, but I do love seeing you with that boy because, for a long time, I thought you were gonna be a lesbian." Tracy's mom showed that she cared that Tracy was involved with someone from the opposite sex. She cared about what people might think about Tracy if she did not have a boyfriend. She cared for Tracy because she did not want Tracy to be thought of as a woman who loves women.

Toward the end of the story, Tracy indicated that she cared for her family. She tried to ease their thoughts that she was a woman who loves women. Tracy thought of telling her mom and sister that she was a woman-who-loves-women. However, when Tracy heard her mom's comments and saw the disgust on her mom's face regarding women-who-love-women, she decided not to tell her mom and her sister the truth. Instead of telling them the truth and hurting their feelings, she wrote, "I burst out laughing and tried not to look guilty by saying to them that I'm not into those things." This line indicated that Tracy cared for her mom and her sister and would rather deny a part of her identity than tell them the truth about her sexual orientation.

### iii. *Hopefulness and Wishful-thinking*

Hopefulness and wishing manifested in Tracy's written memory. In Tracy's written memory, hopefulness was evident several times throughout her story. At the beginning of her story, she wrote about a time when she had a problem with her now ex-boyfriend, and she went to discuss this matter with her mother and her sister. Tracy hoped that her mom and her sister would see that her boyfriend was at fault. After she explained the problems she was having with her now ex-boyfriend, she asked her mom, "now you not going to say anything bad about him?" Tracy's questions could be translated as, "after hearing all that I just explained to you, aren't you going to say something bad about him?" This question that Tracy posed to her mom expressed a form of hopefulness and wishing on Tracy's part. Tracy hoped that her mom would say something bad about her now ex-boyfriend after she explained the issues she had with him.

Tracy's mom's reply to Tracy's question was also hopeful. The mom explained to Tracy that if the boy is wrong, he is. However, she added, "I do love seeing

you with that guy because, for a long time, I thought you were gonna be a lesbian." This response from the mom expressed hopefulness and wishful thinking. She hoped that Tracy would be with the boy because she hoped that Tracy was not a lesbian. Seeing Tracy with the boy made her hopeful.

After Tracy heard her mom's comment, she hoped that she could have said something to her mom and sister at this moment. She stated, "For a moment, I just stopped and looked at them in complete shock, and I was about to take braveheart and say so what if I am..." This sentence showed that Tracy wished she could have said something at this point in the conversation.

However, this was wishful thinking on Tracy's part. She hoped that she could have told her mom that she was a woman that loved women, but she wrote that she was not brave enough to do this.

Toward the end of the story, Tracy's mom expressed her hope that Tracy was not a woman that loves women when she stated, "mi nuh want nuh homosexual or HIV people around mi." These words of the mom showed that she hoped Tracy was not a woman who loves women. She expressed that she does not want any homosexual or HIV people around her. She hoped that Tracy would take her seriously when she expressed her thoughts and her feelings about people who are involved in same-sex relationships.

Tracy explained in her story that she would never forget the disgust on her mom's face when she commented on homosexual and HIV people. Tracy's mom might hope that Tracy would never forget the conversation and her philosophy on same-sex relationships. On the other hand, Tracy might wish to forget the disgust on her mom's face and the conversation. At the end of her story, Tracy stated that her conversation with her mom and sister made her realize that telling her family about how she "felt about women emotionally and sexually is gonna be a real challenge." This showed that Tracy hoped she could have told her family how she felt about women. She wished that it would not have to be a challenge to tell her family how she felt about women.

### iv. *Diseased*

Diseased manifested in Tracy's written memories. Women who love women in Jamaica were perceived as diseased in Tracy's written memory. Tracy's mom expressed her disgust for people who engaged in same-sex relationships. Her mom told her that she does not want to be around anyone who is in such a relationship. Her mom stated, "mi nuh want nuh homosexuals or HIV people around mi." This sentence showed that Tracy's mom equates people in same-sex relationships to people with deadly diseases. Here homosexuals are perceived as people who are diseased.

During the interview with Tracy, she mentioned that when she is in public, she usually gets an awkward stare from people; she went on to say that the stare comes off as a scornful look at times. She stated:

"Ok, being in public spaces with the woman that you love can be awkward at times because if you are out there and people can readily identify you as a lesbian, you normally get the awkward stare, you know...people just start staring at you. Or, you get this scornful look."

This revealed that women who love women in Jamaica are sometimes treated as if they have a horrible disease where they must be scorned, ostracized, and cordoned off from the general public.

## V. DISCUSSION

The research question I investigated for this paper is - how does societal homonegativity shape the lived experiences of a young woman who loves women in Jamaica? Based on the data collected and through thorough analysis, glimpses of the lived experience of a young woman who loves women were captured through her written memory, semi-structured interviews, and examination of Jamaican artifacts, such as Dancehall lyrics. The answers to the research question can be viewed as tentative manifestations of Tracy's life.

Four salient yet tentative manifestations showed up in the data: fear, care, hopefulness and wishful thinking, and diseased. These are glimpses into Tracy's life that bubbled up throughout the data. Therefore, it can be inferred that Tracy lives with these feelings because of her sexual orientation, and this impacts how she is treated by society. The review of literature corroborates the results of glimpses into Tracy's life; therefore, the findings of this study fit relative to the existing body of knowledge on the topic of how societal homonegativity shapes the lived experiences of one young woman who loves women.

For example, fear came up in Tracy's lived experience and literature. Clemencia (1996) documented employers firing female workers because of their sexual orientation and their non-gender-conforming ways of being. Implying that this female non-gender conforming employees were feared; therefore, they were discriminated against. Fear also came up in Charle's (2011) research when he discussed the reluctance of healthcare workers to look after LGBTQI people due to fear; this suggests that fear and being feared are part of the lived experiences of non-heterosexuals and non-gender-conforming youths. Another example of fear in the literature surfaced when West and Cowell (2014) cited evidence to show that Christians feared homosexuals will be condemned by God because their sexual preference does not align with the Christian religion.

The data showed that care was evident in Tracy's daily life through her communication with her

family. Scholars such as West and Cowell (2014) reported that Christians in their study cared for homosexuals. They care for them as people, and their mantra is "love the sinner and hate the sin" this suggests that there is some level of affection that is portrayed toward people who adopt non-heterosexual ways of being. Tracy's life has glimpses of care from her family toward her; however, there is not much evidence from the literature that exemplifies that society as a whole cares for non-heterosexual and non-gender-conforming people. Perhaps Christians care because that is the Christ-like thing to do - care for others. The lack of society's absence of concern for and affection toward non-heterosexuals and non-gender-conforming people in the literature is probably a connotation to their lived reality.

There was a lot of hopefulness and wishful thinking that was captured in the lived experiences of Tracy. Unfortunately, none of the literature reviewed cited any form of hope for LGBTQI people in Jamaica and the wider Caribbean in countries that still criminalize homosexuals and discriminate against LGBTQI people. However, there is hope because some Caribbean countries, such as Curacao and Suriname, do not have laws that punish non-heterosexuals. Therefore, there is hope that more Caribbean countries will recede the law that criminalizes homosexuals. Even though there are no anti-discriminatory laws again LGBTQI people in Curacao and Suriname, these two countries are moving in the right direction and toward a place of hope. LGBTQI people wish other countries will move to decriminalize homosexuality.

Tracy was viewed as diseased through the eyes of her mother and sister. They mentioned HIV when talking to Tracy about non-heterosexuality. This is a fallacy that permeates the Jamaican culture as it relates to LGBTQI people; they are seen as synonymous with HIV. Charles (2011) and White and Carr (2015) wrote about the discrimination that homosexuals face among healthcare workers because of the fear that they have HIV. They are also discriminated against in the wider society because of the perceived association placed on them as being sick with the illness of non-heterosexuality that can be cured. LGBTQI people are not only viewed as having a disease such as HIV, but at times viewed as having mental illnesses that lead to the disease of non-gender conforming and non-heterosexuality.

Societal homonegativity shapes Tracy's life as she experiences fear, care, hope, and wishful thinking, feeling diseased through her encounter with heterosexual people in her surroundings. These feelings, excepting hope, were supported in the literature reviewed. Knowing that Tracy experienced hope is a positive emotion that might now be added to the body of knowledge relating to the lived experiences of women who love women in Jamaica.



## VI. CONCLUSION

In sum, this chapter captured phenomenological glimpses of how homonegativity shapes the lived experiences of one woman in Jamaica who loves women. Data was collected via Tracy's written memory, semi-structured interviews, Jamaican Dancehall music, and my post-reflexion journal. Findings revealed that one young woman who loves women in Jamaica experiences fear, care, hope, and wishful-thinking, and feeling diseased. Future research needs to be done to capture the experiences of women who love women in Jamaica and the wider Caribbean. This research might use surveys to gather large-scale data and ethnography to understand better the sub-cultural experiences of women who love women. Apart from different research methods, different research questions need to be asked where the findings will help society to lessen their fears and their perception of non-heterosexual and non-gender conforming women as diseased, so we can move towards care and hope for all.

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## Between Djelfa's Diary and Almond Field by Max Aub and Tales from Alicante and Albatera by Jorge Campos

By Dr. Pasqual Mas I Usó

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**Abstract-** The article describes the relationship between Max Aub and Jorge Campos and how both fictionalized their respective stays in concentration camps.

**Keywords:** max aub. jorge campos. concentrations camps. correspondence. alicante. albatera.

**GJHSS-G Classification:** DDC Code: 305.800973 LCC Code: E748.M93



*Strictly as per the compliance and regulations of:*



# Between Djelfa's Diary and Almond Field by Max Aub and Tales from Alicante and Albatera by Jorge Campos

Entre *Diario de Djelfa* y *Campo de los Almendros* de Max Aub y *Cuentos de Alicante y Albatera* de Jorge Campos

Beetwen *Diario de Djelfa* and *Campo de los almendros* by Max Aub and *cuentos de Alicante y Albatera* by Jorge Campos

Dr. Pasqual Mas I Usó

**Resumen-** El artículo describe la relación entre Max Aub y Jorge Campos y cómo ambos ficcionalizaron sus respectivas estancias en campos de concentración.

**Palabras clave:** max aub. jorge campos. campos. epistolario. alicante. albatera.

**Abstract-** The article describes the relationship between Max Aub and Jorge Campos and how both fictionalized their respective stays in concentration camps.

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Para Juan Renales  
y algunas no-veladas en Benicarló.

## I. INTRODUCTION

La biografía de Jorge Campos, seudónimo de Jorge José Renales Fernández (Madrid, 1916-El Espinar, 1983), guarda cierta similitud con la de Max Aub (París, 1903-México, 1972); si bien tras los acontecimientos de la Guerra Civil Española (1936-1939) el primero optó por un “exilio interior” (Muñoz 1996), el segundo hubo de rehacer su vida en México. Ambos estuvieron retenidos en campos de concentración, ambos escribieron sobre su experiencia en ellos y a ambos les costó encontrar el caladero de lectores que merecían y, en este sentido, le escribe con sarcasmo el propio Jorge Campos en una carta a Max Aub a propósito de la publicación de su última obra que “aquí le hacen el vacío con gran éxito” (AMA —Archivo Max Aub de Segorbe— C 3-32-5). Además, a ambos autores les une una gran capacidad para el trabajo y una erudición memorable: a Max Aub se le conocía por “Mas Aun” por ser tan prolijo (Otaola 1952: 38) y, en el caso del madrileño, según recuerda Concha Lagos en palabras trasladadas por María Martínez-Cachero Rojo en la introducción a *El atentado* (Campos 1994: 7), era “una magnífica y bien documentada enciclopedia

abierta de par en par para todos”. Eusebio García Luengo detalla el carácter hacendoso de Jorge Campos y le declara “trabajador infatigable” por “su labor de erudición e investigación literarias, paralela a la creadora [...] es asimismo enorme [...] trabaja en investigaciones históricas y literarias, da clases [...] y prepara libros para editoriales (1956: 13-14).

## II. MAX AUB

Max Aub nació en París en 1903, hijo de Federico Guillermo Aub Marx, representante comercial, y de Susana Mohrehwitz. El joven Max estudió en el Collège Rollin de la avenida Trudaine de París, aunque en familia hablaba alemán; y al evocar su infancia siempre recuerda haber estado rodeado de libros y haber empezado a leer en *Los Miserables* de Víctor Hugo (Prat, 1978 y Soldevila 1999). Sus primeros viajes fueron a Berlín, Múnich y Núremberg para ver a su familia y a Montcornet, un pueblecito del Oise en donde veraneaba con sus padres. Con el estallido de la Primera Guerra Mundial, que pilló a su padre en Cádiz, la familia Aub, durante la batalla del Marne, salió de París y fijó su residencia en Valencia, y al año siguiente escribe su primer poema en castellano. Como el propio Max Aub afirmaba, nunca pudo escribir nada en otra lengua (Aub 1992: 109).

Max Aub cursó sus estudios en la Alianza Francesa, en la única escuela laica de la capital valenciana —la Escuela Moderna—, y en el Instituto de Valencia. Sus amigos de entonces fueron, entre otros, la familia Gaos, Juan Gil-Albert, Juan Chabás, Leopoldo Querol, Genaro Lahuerta y Pedro de Valencia. Max Aub trabajó como representante de bisutería de caballero y viajó por toda España, lo que le facilitó algunos contactos importantes, como cuando en Gerona conoció a Jules Romain, seudónimo del filósofo Louis Farigoul, y con una tarjeta suya se presentó a Enrique Díez-Canedo, gracias al cual se leyeron versos suyos

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en el ateneo madrileño, y, en 1925, publicó su primer libro, *Los poemas cotidianos*.

De 1929 a 1939 se reafirmó su compromiso humano y político, según señala Miguel-A. González Sanchis (Aub 1992: 119), y amplió el círculo de amistades a personalidades tan destacadas como Gerardo Diego, Antonio Machado, Jorge Guillén, Ramón Gaya o Dámaso Alonso. Su adscripción al bando republicano durante la Guerra Civil le llevó al exilio en enero de 1939 y a partir de este momento, delatado en 1940 como comunista, ingresó en los campos de concentración de Marsella, Rolland Garros, Vernet, Niza, Vernet y Djelfa. Este último destino marcó su trayectoria literaria, pues el viaje en barco le inspiró para escribir *San Juan* y en el campo argelino escribió su poemario *Diario de Djelfa*.

El próximo destino de Max Aub fue México, en donde se estableció desde 1942 con la ayuda de Enrique Díez-Canedo y de Alfonso Reyes, que le ayudó a naturalizarse en 1955. Desde su llegada a México trabajó en el mundo del cine como autor, traductor o director en más de cincuenta guiones cinematográficos, al tiempo que explicaba Teoría y Técnica Cinematográfica, y colaboraba en el *Nacional* y el *Excelsior*.

En 1946 se reunió con su familia en Cuba y, posteriormente, regresó a México a la que será su casa de siempre en Euclides, 5 del Distrito Federal.

Tras su naturalización, viajó por Europa de 1956 a 1958 y a su regreso a México continuó ligado al cine y a la Universidad, en la que dirige la estación de radio de 1960 a 1966, año en el que, en solidaridad con el rector, dimite a causa de las revueltas estudiantiles.

En 1966 viajó a Israel enviado por la UNESCO para dar un curso en la Universidad Hebrea y fruto de este viaje es el poemario *Imposible Sinaí*, escrito siguiendo el procedimiento que ya había empleado para componer *Antología Traducida*: invención de poetas y de poemas cuyos textos se presentan a modo de antología trasladada de otro idioma. En 1972 visitó España y, a su regreso a México, murió el 22 de julio.

La producción literaria de Max Aub es muy extensa y abarca todos los géneros, aunque destaca en novela —*Laberinto mágico* (verdadero mural de la Guerra Civil Española compuesto por 6 novelas)— y teatro.

### III. JORGE RENALES

Al estallar la Guerra Civil Española en 1936, Jorge José Renales Fernández se alistó en la base de blindados de venta del Poyo, en Quart de Poblet, donde publicó sus primeros relatos en *Héroes de Levante* (1938) —exaltación del soldado de infantería— y *Cinco días del tren blindado* (1939) —sucesos acaecidos en la zona del Maestrazgo castellonense y turolense. Quizá por ello, en la carta en la que se da a conocer a Max

Aub, refiriéndose a *Campo de sangre* (Aub 1945), le dice que “de todo lo suyo que he leído, lo que más me ha gustado han sido las escenas turolenses de su novela” (AMA C 3-32-1). Así que fue en Valencia donde Jorge Campos organizó las colonias escolares y colaboró en *La Hora* de Valencia, bajo el inocente seudónimo de Tom Sawyer, en la sección “Pum” (Campos 1990: 9).

Acabada la guerra fue apresado en el puerto de Alicante y trasladado al campo de Albatera (Martínez-Cachero 1991: 277), hechos que se refieren en su libro póstumo *Cuentos sobre Alicante y Albatera* (1995) y también en *El atentado* (1994) donde selecciona los relatos “Campo de los almendros” y “Las naranjas” (Campos 1994: 109-119) procedentes del libro anterior.

Tras ser liberado vivió en Valencia, donde digirió sus vivencias para reflejarlas, ya residente en Madrid, en *Tiempo pasado* (1956). Jorge Campos fue incapacitado para ejercer de maestro (BOE 19-5-1941: 5), y publicó en colaboración con Manuel Heredia *Seis mentiras en novela* (1940) ya bajo el seudónimo de Jorge Campos. En aquella época trabajó como corrector en Gráficas Bernés y Tipografía Moderna y promovió diversas revistas. Su amigo José Hierro rememora en el colofón del libro *Bombas, astros y otras lejanías* (Campos 1992: 195-198) aquellos tiempos en los que se llamaban de “don”, junto a José Luis Hidalgo, en la pensión de doña Esperanza.

Establecido en Madrid tras acabar sus estudios de Filosofía y Letras, comienza su extensa trayectoria como editor de textos clásicos, se prodiga en las tertulias de la capital y colabora en numerosas revistas. Además, como becario del instituto Gonzalo Fernández de Oviedo, investiga en el estudio de Hispanoamérica, y fruto de ello fue la *Antología de la literatura hispanoamericana* (1950), que siguió a su *Historia de la literatura universal* (1946), ambas encargadas por la editorial Pegaso. Más tarde, además de desarrollar una importante labor docente, completó su trayectoria investigadora en ediciones e introducciones y con los estudios *Cervantes y el Quijote* (1959), *Conversaciones con Azorín* (1964a), y *Teatro y sociedad en España. 1970-1980* (1968).

En cuanto a su vertiente creativa reúne sus relatos en libros como *El hombre y lo demás* (1953), *Tiempo pasado* (1956), *Cuentos en varios tiempos* (1971) y *Elección de sepultura* (1919); y recibió el Premio Nacional de Literatura en 1955 por *Tiempo pasado* (1956).

Señala Luis Muñoz (1996) cómo, después de la muerte de Franco, Jorge Campos decidió convertir sus vivencias como prisionero del Campo de Albatera en relatos, aunque la mayoría no vieron la luz en vida de nuestro autor. El propio Max Aub, en la dedicatoria del ejemplar de *Campo de los almendros* (Aub 1968) que le envía a Madrid, le recuerda: “que debió haberlo escrito

él —entre otras cosas porque sí estuvo—, in memoriam y con un fuerte abrazo”.<sup>1</sup>

#### IV. MAX AUB, *DIARIO DE DJELFA Y CAMPO DE LOS ALMENDROS*

Max Aub convierte las anécdotas del campo de concentración argelino en su *Diario de Djelfa*, título que Jorge Campos no recuerda con exactitud en su primera carta y lo cita, con dudas expresadas entre interrogantes, como *Diario del alba*.<sup>2</sup> Los *Cuentos sobre Alicante y Albatera* narran los meses de marzo a octubre de 1939, que luego continuará con *Tiempos pasados* con los primeros años de posguerra hasta 1943. Pero también Max Aub vuelve a su experiencia en los campos, aunque prestada en este caso, en *Campo de los Almendros*, título que se repite en uno de los cuentos de Jorge Campos.

El *Diario de Djelfa* de Max Aub —del que, como hemos visto, tenía conocimiento Jorge Campos aunque dude en el título— reúne una serie de poemas para dejar prueba de su estancia en el campo de concentración argelino de Djelfa. Max Aub había acabado en él después de pasar por los campos de Argelès-Sur-Mer y de Vernet, en Francia, y es en el desierto argelino, entre 1941 y 1942, donde decide dar testimonio a través de sus poemas de su cautiverio. Al principio el libro se publicó con 27 poemas (Aub 1944) pero sabemos por nuevas ediciones y por el rescate de material inédito (Mas 2019) que tenía más material poético que fue descartado bien por exigencias editoriales, bien por otras razones.

En cuanto a *Campo de los almendros*, Max Aub cierra con él las seis novelas que conforman el “Laberinto mágico”, su visión sobre la Guerra Civil Española (1936-1939). Así pues, en esta última novela de la hexalogía Max Aub narra los últimos días de la guerra, la acumulación de republicanos en Alicante y el definitivo desmoronamiento de la República Española. Caos y desolación constituyen un fresco que mezcla realidad y ficción en busca de la verdad que se nutre de numerosa documentación y testimonios, como el que le ofrece el historiador Manuel Tuñón de Lara, presente en el puerto de Alicante: “Puedo testimoniar la minuciosidad don que Max Aub recogió centenares de testimonios orales y documentos, con que leyó textos de prensa, antes de escribir una línea” (Tuñón de Lara 1972: 36). Esta novela-reportaje sobre los miles de republicanos apelotonados en el puerto de Alicante saca a la luz cientos de anécdotas y personajes que

exigen en las ediciones dedicadas al lector de hoy un sinfín de notas aclaratorias, como así sucede en la preparada por Francisco Caudet (Aub 2000) que permite, además, desvelar quienes se esconden tras la ficcionalización aubiana, por ejemplo Ángel Gaos detrás de Vicente Dalmases, según afirma Margarita Ibáñez (2020: 51).

#### V. JORGE CAMPOS Y LOS *CUENTOS DE ALICANTE Y ALBATERA*

La novela de Max Aub engancha con los primeros relatos de *Cuentos de Alicante y Albatera* de Jorge Campos, en donde este narra su experiencia al tiempo que establece la normalidad de la tragedia cotidiana en el campo de concentración, uno de los más duros del franquismo. Jorge Campos redactó los cuentos en el invierno y verano de 1978 en Madrid y El Espinar (Campos 1992: 41), aunque no cabe duda de que había recogido apuntes sobre ellos durante años; quizá esperó a la muerte del dictador y a ver si la deriva sangrienta española desaparecía. Según su amigo Ricardo Blasco, en enero pergeñó los primeros relatos (Campos 1985: 9) y en verano ya estaba corrigiendo la mayoría en El Espinar. La versión definitiva, ya ciego, la cerró dictando correcciones en condiciones difíciles. Hasta el momento, exceptuando los libros anteriores a la Guerra Civil, los argumentos de sus relatos habían evitado conceptos que le pudieran comprometer ante la censura; tan solo en *El hombre y lo demás*, en el relato “La maniobra”, encontramos palabras como “democracia”, “dictadura”, “presidente de la República”, “Mussolini” y frases en las que se aprecia un sentido irónico como en “camisas pardas, o cualquier otra, sea cual fuere su nombre” (Campos 53: 78), en relación a las “camisas negras” del fascismo italiano o quizá a las “camisas azules” de los falangistas españoles.

Como Max Aub, también recurrió a conocidos del Campo de Albatera para corroborar informaciones sobre el yermo saladar de Albatera en el que en 1939 estaban los barracones rodeados de alambradas y vigilados por torres de vigilancia. Jorge Campos se retrata en “Campo de los almendros”, “Desvalidez”, “Gupo 46” y “Muerte y vida”, siempre con la “chaqueta grande” con la etiqueta “Perramus”. El llamado “poeta” o “Miguel el poeta” que aparece en “El anochecer de los suicidios” es Miguel Alonso Calvo, es decir: Ramón de Garcisol. El “Pascual” de “Muerte y vida” es el poeta Pascual Pla y Beltrán. Ernesto Giménez Caballero aparece como “el jerarca”. Y el que escapa en “Campo de los Almendros” junto a Jorge Campos es Ricardo Juan Blasco. Este último proporciona información sobre otros personajes que también aparecen en los relatos: Fernando Ferraz, como “Fernando”; Ricardo Cornejo, como el “peruano”; Félix Luengo, como el personaje con guerrera; y Simón Otaola, como Gutiérrez. Así

<sup>1</sup> Archivo Familiar de Jorge Campos. También se conservan otras dedicatorias de Max Aub: “A Jorge Campos, su amigo. Max Aub. Euclides 5. México 5 D.F.”, en *Campo abierto* (1951); “A Jorge Campos con la vieja amistad de Max Aub”, en *Campo del moro* (1963); y, “A Jorge Campos en la admiración de Max Aub”, en *Ciertos Cuentos* (1955).

<sup>2</sup> Ibid.



como los militares Etelvino Vega y Nilamón Toral, el comisario de tanques Luis Sendín, los hermanos Soriano, el periodista Navarro Ballesteros, Ángel Gaos, Manuel García Pelayo y el doctor Juan Peset Aleixandre —rector de la Universidad de Valencia— (Campos 1985: 28).

*Cuentos sobre Alicante y Albatera* consta de quince relatos que María Martínez-Cachero Rojo (1991) analiza estructuralmente, por lo que vamos a centrarnos brevemente en su descripción argumental. En “La fuga” se refieren los últimos días de la República, con el gobierno ya en Valencia, ciudad a la que se dirige el protagonista, desencantado por las promesas de unos y de otros, viajando en la caja de un camión. Por fin llega a Valencia para confundirse entre una multitud que busca el puerto como única posibilidad de huida. “El loco” se basa en un personaje que clama encaramado a una antena impasible a la inactividad de los grupos de ayuda internacional en el puerto de Alicante, en concreto el llamado Comité de No Intervención. Aparecen en él el cónsul de Argentina y un diputado francés cuya identidad coincide con la del comunista Charles Tillon (Campos 1985: 22). “El anochecer de los suicidios” da fe del trágico desenlace de algunos refugiados que decidieron no afrontar el futuro tormentoso que les esperaba. En *La muerte de la esperanza*, Eduardo de Guzmán señala que eran tantos los suicidios que “en dos días más el enemigo no tendrá nada que hacer, porque nos habremos matado todos” (1973: 361). “Llegaron los barcos” es la descripción de una espera en una “zona internacional” que no será respetada. El relato nos lleva a la angustia de *Esperando a Godot* de Samuel Becket, salvo que aquí los barcos que se esperan no pueden llegar porque otros bloquean la entrada del puerto. En realidad, el último buque que había zarpado de Alicante fue el Marítima el día 28 de abril de 1939, antes de la llegada de Jorge Campos —que salió de Albatera el 30—; después fue el crucero franquista Canarias el que impedía la entrada de otros barcos, hasta que fondearon los minadores Júpiter, Marte y Vulcano, de los que desembarcó el Cuerpo de Ejército de Galicia (Campos 1985: 27). “La escollera” no es más que un escondite al que confía su suerte un prisionero.

Vale la pena detenerse en el cuento “Campo de los Almendros”, que puede pasar por un conjunto de anécdotas de lo narrado en la extensa novela *Campo de los almendros* de Max Aub y cuyo estudio comparativo pormenorizado reservamos para otra ocasión. En este sentido, Jorge Campos, en la dedicatoria del ejemplar de *Teatro y sociedad* (1968) que le envió para felicitarle el año nuevo de 1969 llama a Max Aub “superviviente del campo de los almendros”.<sup>3</sup> Por otra parte, en el relato de Jorge Campos rezuma una bondad que Joaquín

Entrambasaguas (1953: 468) toma como característica de su obra, pues afirma que “el hombre es bueno en la obra de Jorge Campos y lo demás, como inspirado por el hombre o afecto a él, tampoco encierra maldad y, cuando la hay, se borra por los mismos personajes”. En efecto, el final del relato, con el regreso de los personajes al campo, anuncia que “volvieron al interior, como dos chicos temerosos de un castigo” (Campos 94: 115). La afirmación de Entrambasaguas es matizada por María Martínez-Cachero Rojo en la introducción a *El atentado* (Campos 1994: 22) donde aporta diversos ejemplos en los que aparece la crueldad y la ambición. Martínez-Cachero reseña cómo en “Campo de los almendros se asiste a la metamorfosis de un campo alicantino, nevado de flores blancas, en un escenario gris, “como si sobre ellos [los almendros] también hubiera caído la derrota” (Campos 1994: 109). El relato describe a los prisioneros que permanecen cercados, a los militares italianos que se llevan a las mujeres, e insiste en el cansancio, el sueño interrumpido por ráfagas de ametralladora, la espera, la huida de Fernando (Ricardo Juan Blasco) y su amigo (el propio Jorge Campos) y el perplejo regreso de estos al campo. En realidad, la salida de Jorge Campos del Campo de Albatera fue más rocambolesca, como cuenta su amigo Pablo Beltrán de Heredia en la introducción a *Bombas, astros y otras lejanías*:

Se recibió un día, en la prisión, la orden de que fueran puestos en libertad los internos mayores de sesenta años y menores de dieciocho. Para acogerse a dicho beneficio, era preciso formular una declaración jurada. Como la mayoría de los reclusos no sabía escribir, preguntó un oficial quién podría hacerlo. Se adelantó Jorge Campos —entonces todavía Jorge Renales—, y fue encargado de redactar las declaraciones de los veintidós presos que habían de salir; pero a ellas unió la suya propia, aun cuando él no reuniera las condiciones exigidas (Campos 1992: 19).

Siguiendo con los relatos restantes, en “Las naranjas” se narra el traslado a pie de una columna de prisioneros desde el campo a la ciudad, a cuyo paso las gentes ofrecen pan y naranjas. La anécdota, sucedida el 7 de abril de 1939 (Campos 1985: 25), surge cuando los soldados impiden que los ciudadanos ofrezcan comida a los prisioneros y las naranjas caen al suelo y ruedan por la pendiente. A nuestro juicio, la catarata de naranjas entre las piernas de los prisioneros constituye una imagen imborrable. “La llegada” se detiene en el angustioso traslado en tren hasta el Campo de Albatera. “Grupo 46” rememora las desventuras de un conjunto de prisioneros fácilmente identificables porque dice sus nombres y apellidos. “Desvalidez” cuenta cómo escabullirse aprovechando la lluvia. “Muerte y vida” resulta autobiográfico pues refiere cómo se rompe la monotonía cruel y famélica del campo con un mensaje de altavoz que le va a propiciar la libertad mintiendo sobre su edad. “Pesadilla” se

<sup>3</sup> BMA: Biblioteca Max Aub de Segorbe.

sumerge en la perplejidad de sentirse fuera del campo y, sin embargo, naufragar en la incredulidad de lo que le ocurre al personaje: caminar, comer, oír música, dormir y esperar al tren. “Limosna” responde a la literalidad de cómo conseguir comida. “El jerarca” —reflejo de Ernesto Giménez Caballero, miembro de la Junta Política de Falange y de la J.O.N.S.— presenta a un gerifalte militar en plena perorata exaltadora del franquismo y del catolicismo. Y “El sargento” —inspirado en Miguel Alonso Calvo— describe a un personaje cuya misión es custodiar a los “rojos”.

Cuentos de Alicante y Albatera, según María Martínez-Cachero, “supone, estéticamente hablando, una clara y feliz culminación del arte narrativo de su autor y acredita, además, con su no apelación al tremendismo, al pesimismo y al resentimiento político, la bondad de su ánimo” (1991: 309).

## VI. EPISTOLARIO ENTRE JORGE CAMPOS Y MAX AUB

Prueba del paralelismo entre la trayectoria de Max Aub y la de Jorge Campos es la correspondencia que mantuvieron, de la que se conservan unas pocas cartas en la Fundación Max Aub de Segorbe (Caja 3, nº 32). Muestra de la falta de documentación es que, si se conservan felicitaciones de 1954, 1955, 1956 y 1965 en el Archivo Familiar Jorge Campos, lo lógico es que las hubiera de otros años; de hecho entre los documentos de Jorge Campos se conservan felicitaciones de Max Aub de los años 1959, 1962-1965 y 1967 formando parte del característico impreso “El correo de Euclides” que Max Aub mandaba a sus amigos para desear un feliz año nuevo. El interés de Jorge Campos resulta evidente, pues en su trayectoria civil y literaria están presentes, como en la de Max Aub, las consecuencias de la Guerra Civil Española.

En la primera carta Jorge Campos se da a conocer y manifiesta el deseo de intercambiar libros, pero también de recabar información sobre autores en el exilio mexicano y sobre la literatura hispanoamericana, tanto la actual como la precolombina. Jorge Campos cita a algunos amigos como Ricardo Juan Blasco, Simón Otaola, Manolo Bonilla Baggetto y Miguel Enguñados para demostrarle su pertenencia al grupo de conocidos mutuos, de ahí que, como se verá en las cartas que aportamos, se refiera a ellos tan solo con el nombre de pila o con el apellido.

Manuel Bonilla Baggetto fue el fundador en 1950 de la Librería Bonilla en la calle Simón Bolívar, nº 34 de México DF. La Fundación Max Aub custodia una carta de este a Max Aub<sup>4</sup> en la que firma como “Manolo” y en la que le da las gracias por enviarle el libro *Heine*. Cuando Manolo Bonilla decide establecerse

en México, Miguel Enguñados escribe a Max Aub para que este le ayude:

Mi querida familia. Tengo el gusto de presentarles, y de saludarles por su mediación, a mi buen amigo Bonilla Baggetto. Va a instalarse en esa ciudad y aunque tiene a su familia quizás Vds. puedan contribuir a ambientarle. Es un hombre activo e inteligente. Puedo afirmarlo porque además de amistad que con él me une hemos trabajado juntos en varios asuntos comerciales. No me cabe duda de que le tratarán como Vds. saben hacerlo. ¡No saben cómo le envidio en estos momentos!<sup>5</sup>

Miguel Enguñados Requena,<sup>6</sup> autor de *La poesía de Luis Palés Matos* (1961) aparece en *Campo de los almendros* en la “Página azul” (Aub, 1968: 510) y fue quien facilitó la dirección de Max Aub a Jorge Campos y a Ricardo Juan Blasco según se puede leer en una carta en la que Miguel Enguñados se lo advierte a Max Aub diciéndole que “tanto Jorge Campos como Ricardo Juan me pidieron su dirección para escribir por su cuenta y supongo que lo habrán hecho”.<sup>7</sup>

Todo lo que le pregunta Jorge Campos a Max Aub se lo contesta en una carta que Max Aub manda a Miguel Enguñados, a Jorge Campos y a Ricardo Juan Blasco a la vez en la que uno tras otro responde a las cuestiones que cada uno le había planteado. En el caso que estudiamos, se puede leer:

Querido Jorge Campos, le agradezco sus líneas, conozco algún cuento suyo —y su carta a [Manolo] Bonilla—. Le enviaré revistas. Tengo las mejores relaciones con el Fondo de Cultura Económica, que es mi editor. Le interesa mucho que le envíe usted las reseñas de sus libros. Voy a intentar que le envíen algunos.<sup>8</sup>

Sin embargo algo sucedió con las respuestas pues en otra carta a Ricardo Juan Blasco —del 10 de febrero de 1949—, Max Aub se queja de que “hace algún tiempo escribía a M[iguel] E[nguñados] una carta para usted, Miguel y Jorge y me extraña mucho no haber tenido por lo menos un acuse de recibo. Dígaselo usted”.<sup>9</sup> No obstante, sí le contestaron, pues Ricardo Juan Blasco le responde a Max Aub —1 de marzo de 1949— que “Me dice Jorge que Miguel le contestó a usted oportunamente [...] He dado a Jorge cuatro libros para que los incluya en un envío que le hace”.<sup>10</sup>

Ricardo Juan Blasco estuvo con Jorge Campos en el campo de concentración de Albatera y por ello sale en los *Cuentos* aparte de prologar el libro, y también manifiesta interés en comunicarse con Max Aub. Ricardo Juan Blasco era el director de *Corcel*.

<sup>5</sup> AMA C 5-35-4.

<sup>6</sup> Vid. sobre este autor *Los hallazgos de la lectura: estudio dedicado a Miguel Enguñados*. Eds. John Crispin, Enrique Pupo-Walker y Luis Lorenzo-Rivero. Madrid, José Porrúa, 1989. En el Archivo Max Aub de Segorbe (Caja 5, nº 35) se conservan 34 cartas entre Aub y Enguñados.

<sup>7</sup> AMA C 5-35-7.

<sup>8</sup> AMA C 2-30-6a.

<sup>9</sup> AMA C 2-30-7.

<sup>10</sup> AMA C 2-30-8.

<sup>4</sup> AMA C 2-34-1.

*Pliegos de Poesía*, en la que colaboró Jorge Campos en el número 8 de agosto de 1944 con *Cinco prosas*.

En el momento de escribirle la primera carta, Jorge Campos solo había publicado unas crónicas en *Héroes de Levante. Crónicas de la resistencia* (¿1938?), *Cinco días del tren blindado* (firmado —como el anterior— como Jorge Renales, 1939), *Seis mentiras en novela* (“El triunfo del infierno. La mentira del ermitaño”, El triunfo de los malos. La mentira de la pantalla” y “El triunfo de la estatua. La mentira del arte”, 1940), Juan Boscán. *Poesías. —Prólogo—* (1941), *Poesía lírica castellana —presentación y notas—* (1941), *Eblis. El triunfo del infierno* (1942), *Cuentos negros* (1943a), *Y nació la sombra* (1943b) e *Historia de la literatura universal* (1946).

Jorge Campos se refiere en su primera misiva especialmente a *Eblis. El triunfo del infierno* del que se tiraron 300 ejemplares con cubierta y 6 viñetas de José Luis Hidalgo. La edición corrió a cargo de Pedro Caba, Demetrio Ramos, Ángel Lacalle, Juan Lacomba y Ricardo Juan Blasco. El libro se lo había enviado a Max Aub el 23 de abril de 1948 a través de Miguel Enguídanos, según se puede leer en una carta de este último a Max Aub en la que le remite varios libros que, además, describe, y, al llegar al librito mencionado escribe sobre él: “Jorge Campos: *Eblis* (es un cuentecito que publicó hace tiempo. Me pide él mismo que le disculpe ante Vd. por enviarle una cosa tan pobre pero lo cierto es que casi toda su obra permanece inédita”<sup>11</sup>. No fue el único envío, pues el 15 de febrero de 1949 le adelanta: “llegará un paquete de Jorge”<sup>12</sup>. El ejemplar se conserva en la Biblioteca Max Aub de Segorbe y lleva por dedicatoria: “A Max Aub, con un cordial y trasatlántico abrazo. Jorge”.

Otro de los autores citados en las cartas es Simón Otaola que se exilió a México en 1939. Se estableció en Veracruz, Guanajuato y, finalmente, en México D.F., donde murió. Fundó la revista *Tertulia* y la editorial *Aquelarre*. En 1955, cuando se le cita en la carta, Simón Otaola había publicado en su editorial mexicana retratos de exiliados en *Unos hombres* (1950), datos sobre el exilio en *La librería de Arana* (1952) y la novela *Los tordos en el Pirul* (1953).

En cuanto al lugar que ocupa Jorge Campos en la literatura hispánica, a pesar de sus numerosas colaboraciones tanto en terreno creativo como en el historiográfico y en el editorial, lamentablemente, en palabras de José Hierro (1990: 5), “como ocurre siempre en toda persona que ha vivido dos o tres años sin estar en el retablo de las maravillas, pasa al olvido. Esto ha ocurrido con Jorge”.

## ANEXO: EPISTOLARIO

[1] AMA C 3-33-1

[Escudo, membrete y dirección del CISC]

Madrid 16, diciembre, 1948

Sr. D. Max Aub.

Méjico.

Estimado amigo:

Le doy este nombre porque el suyo hace tiempo me es familiar. Primero alguna lectura, luego mi estancia en calidad de corrector, director literario y otras sumisas obligaciones en Tipografía Moderna de Valencia,<sup>13</sup> do[n]de se recuerdan su *Fábula verde* y *Pedreña*,<sup>14</sup> de vez en cuando, después lecturas, otra vez, por medio de nuestro común amigo, el impetuoso y mediterráneo [Miguel] Enguídanos, y noticias en cartas de [Manolo] Bonilla.

Hace algún tiempo que pensaba escribirle y enviarle mis escasas ediciones. Con esta fecha le hago un paquetillo. No valen gran cosa. Si acaso el cuento *Eblis*,<sup>15</sup> que desaparece en lo menudo de la edición. Espero que en adelante le pueda enviar cosas mejores. Mi *Historia de la Literatura Universal* que a despecho de todo es un pequeño prodigio de objetividad anda por ahí en los escaparates. No sé si esto querrá decir que se venderá. Los editores me juran que no por los huesos de Marco Polo.<sup>16</sup> —Ahora caigo en que conocerá Ud. alguno de mis cuentos por la colección de Corcel<sup>17</sup> que le envió Ricardo Juan [Blasco]—. Ya me hablará de ellos. Yo, por adelantar[le] un poco mi opinión le diré que de todo lo suyo que he leído, lo que más me ha<sup>18</sup> gustado han sido las escenas turolenses

<sup>13</sup> La Tipografía Moderna de Valencia fue fundada en 1899 por el poeta y dramaturgo en valenciano Miguel Gimeno Puchades. En 1933 la empresa hizo suspensión de pagos y el yerno del fundador, Manuel Soler Soria, la adquirió en subasta y la reabrió. Entre 1936 y 1939 la empresa estuvo intervenida por un comité. El traslado del gobierno a Valencia le dio un gran impulso. Desde 1940 lleva el nombre de Artes Gráficas Soler.

<sup>14</sup> *Luis Álvarez Petreña*. (Aub 1943).

<sup>15</sup> En la BMA también se conservan ejemplares de Jorge Campos de *La literatura hispanoamericana en el siglo XIX* (1948), *El hombre y los demás* (1954), *Tiempo pasado* (1956), *Conversaciones con Azorín* (1964) y *Teatro y sociedad* (1968).

<sup>16</sup> Al parecer, Marco Polo fue enterrado en la iglesia de san Lorenzo, en Venecia, según deseo manifestado en su testamento, pues allí reposaba su padre Nicolò (AA. VV. *Un piccolo regno teocrático nel cuore di Venezia: il Monastero di san Lorezo*. Ed. de Odilla. Venezia, Filippi, 1993: 61-62, n. 6). Pero durante los trabajos de reconstrucción de 1592 a 1602 desaparecieron sus huesos. De 1908 a 1923 se buscaron infructuosamente sus restos.

<sup>17</sup> La revista *Corcel* (1942-1949) fue publicada en Valencia por la editorial Cosmos. Luis Muñoz Navarro le dedica un apartado a esta colaboración en su tesis doctoral *Jorge Campos y la actividad literaria en el exilio interior* (1966).

<sup>18</sup> En el original *han*.

<sup>11</sup> AMA C 5-35-6b.

<sup>12</sup> AMA C 5-35-9b.

de su novela.<sup>19</sup> Me parece que no se puede captar mejor el ambiente de aquellos días. E<sup>20</sup> inclino ante ellas unas cuartillas que emborroneé sobre lo mismo.<sup>21</sup> Quizá Manolo [Bonilla] recuerde. En general la novela me gustó. Más que el *Diario del Alba*<sup>22</sup> —¿Se llama así?—. Su revista unipersonal,<sup>23</sup> interesantísima. Para mi gusto lo de más valor es *Tránsito*,<sup>24</sup> sobre un problema que se repite y se repite y nos callamos. Es curioso que aquella cosa en un acto sobre la criada coincide con el fondo de una cosa titulada *Las criadas*,<sup>25</sup> publicado en SUR,<sup>26</sup> al mismo tiempo. Siempre me ha preocupado mucho cómo en determinadas épocas aparece la coincidencia de temas. Sin caer en esas disquisiciones idiotas de si fue primero este o el otro.

Pero me estoy poniendo pesado. Ya le ha dicho Miguel [Enguídanos] le vamos a enviar la carta en que Ud. Se interesa por el balance literario del año. También he escrito a Manolo [Bonilla] sobre ello. Escribirla será, casi, casi, un placer.

No sé si conocerá mis actividades. Tengo en imprenta una *Antología de Literatura Hispanoamericana*<sup>27</sup> y preparo una *Historia*.<sup>28</sup> En este sentido le agradezco los envíos a Miguel ya que me beneficio de su lectura, pero espero de su gentileza —como dicen mucho por ahí— me envíe revistas. Y que conste que no las pido de las caras, sino de esas que se compran en toda casa y luego se tiran y contienen indicaciones bibliográficas. Especialmente me interesa lo indígena y lo actual. Aun no han llegado los prometidos libros de Chilam Balam.<sup>29</sup> El Popol Vuh<sup>30</sup> ya

lo conozco en esa edición. Me interesaría saber si tiene Ud. relación con el Fondo de Cultura Económica para enviarles una serie de reseñas sobre sus libros, publicadas aquí.

Y nada más. Espero sus noticias y le pido ya perdón por mis peticiones.

[Firma]: Jorge Campos.

[2] Carta de Max Aub a Ricardo Juan Blasco y otros. AMA C 2-30-6a.

Mis queridos amigos.

Recibí sucesivamente las cartas de Miguel [Enguídanos], Ricardo [Juan Blasco] y Jorge [Campos], tan alborozadas todas por el futuro curso de [José] Ortega [y Gasset], y los recortes acerca de la primera conferencia [...]

Querido Jorge Campos, le agradezco sus líneas, conozco algún cuento suyo —y su carta a [Manolo] Bonilla—. Le enviaré revistas. Tengo las mejores relaciones con el Fondo de Cultura Económica, que es mi editor. Le interesa mucho que le envíe usted las reseñas de sus libros. Voy a intentar que le envíen algunos [...].

[Firma]: Max Aub.

<sup>19</sup> En *Campo de sangre* (1945) Max Aub incluye un capítulo al principio de la segunda parte titulado "Teruel". Max Aub había escrito sobre el tema en 1937 *Teruel*, representada por las Guerrillas del Teatro, aparte de colaborar en 1938 con André Malraux en el rodaje de *Sierra de Teruel*.

<sup>20</sup> En el original Y.

<sup>21</sup> Quizá se refiera a sus dos primeras colaboraciones, firmadas como Jorge Renales, en *Héroes de Levante. Crónicas de la resistencia* (¿1938?) y *Cinco días del tren blindado* (1939).

<sup>22</sup> Se refiere al poemario *Diario de Djelfa* (1944). Esta primera edición solo contenía 27 poemas.

<sup>23</sup> La revista *Sala de espera* (1948-1951), impresa en México por Gráficas Guanajuato, contenía exclusivamente obra de Max Aub, de ahí lo de "unipersonal".

<sup>24</sup> *Tránsito* apareció en el primer número de la revista *Sala de Espera* (1-10).

<sup>25</sup> Jean Genet, *Las criadas*, Buenos Aires, Sur, 1948. Traducción de J. J. Rinieri.

<sup>26</sup> La revista argentina SUR fue creada en 1931 por Victoria Ocampo, a instancias de Waldo Frank, José Ortega y Gasset y Eduardo Maella, con el fin de acercar escritores extranjeros al conocimiento de los lectores. La editorial se fundó con el mismo nombre dos años más tarde, en 1933, y en ella se publicó en 1959 la traducción de *Las criadas* realizada por José Bianco.

<sup>27</sup> Campos 1950.

<sup>28</sup> Este proyecto no cuajó, pero sí algunos artículos, ediciones y capítulos especializados; por ejemplo en *Historia general de las Literaturas Hispánicas*, IV (VV. AA. 1957: 155-239). El no cuajar proyectos editoriales constituye un leitmotiv de *Tiempo pasado* (1956).

<sup>29</sup> Libros anónimos de la cultura maya, escritos en lengua maya durante los siglos XVI y XVII, en la ciudad de Chilam Balam. Jorge

Campos se refiere a *El libro de los libros de Chilam Balam*, México, Fondo de Cultura Económica, 1948.

<sup>30</sup> El *Popol Vuh*, o *Libro del conejo*, es una recopilación de narraciones míticas del pueblo indígena guatemalteco quiché. Jorge Campos se refiere al libro *Popol Vuh. Las antiguas historias del Quiché*. Traducción de Adrián Recinos. México, Fondo de Cultura Económica, 1947.



[3] Ms. AMA C 3-33-2

A Max,  
Siempre debiéndole carta.  
¡Feliz 1954!

[Firma]: Jorge C[ampos].

Recibí su libro. Le envió uno mío. Desearía su opinión (aquí le hacen el vacío con gran éxito).

[La postal lleva la imagen de una casa con cipreses y abetos.]

[4] AMA C 3-33-3

A Max Aub  
y los suyos.  
¡Feliz 1955!

[Firma]: Jorge Campos.

Por fin he podido corresponder, aunque muy modestamente, a su atención enviándome sus obras. ¿Conoce mi libro *El hombre y lo demás*?<sup>31</sup> No sé si se lo envié o no. A [Manolo] Bonilla no le llegó. A [Simón] Otaola sí.

Un abrazo.

[La postal lleva la imagen de un abeto.]

[5] AMA C 3-33-4

Max Aub  
Euclides 5  
Nueva Anzures  
México, DF., 28 de febrero de 1955

Sr. Don Jorge R. Campos  
Medinaceli 4  
Madrid, España.

Mi querido amigo:

Me excuso muchísimo de no haberle contestado antes, pero he estado muy enfermo.

Primero quiero decirle lo bien que me ha parecido su nota acerca de *Las buenas intenciones*,<sup>32</sup> y cuánto se la agradezco.

Por otra parte, su libro *El Hombre y lo Demás*<sup>33</sup> es de los más inteligentes, de los más humanos que me ha sido dado leer en prosa, de lo publicado en España en estos últimos años.

No tengo la menor duda acerca de su futuro literario, y no sabe usted cuánto me alegro.

Me gustaría saber si ha recibido usted mi libro acerca de la *Poesía española contemporánea*,<sup>34</sup> por si acaso, le he enviado a usted otro ejemplar hace unos días.

Perdóneme que no le escriba más.

Me prometo y le prometo hacerlo algún día cercano.

No necesito repetirle que soy su amigo.

[Firma]: Max Aub<sup>35</sup>

<sup>31</sup> Campos 1953.

<sup>32</sup> Se refiere a la reseña aparecida en *Ínsula*, n° 108, diciembre de 1954.

<sup>33</sup> Campos 1953.

<sup>34</sup> Aub 1954.

<sup>35</sup> Puesto que lleva firma, se trata de una copia o de una carta que no llegó a mandar.



[6] AMA C 3-33-5

A Max Aub  
con el deseo de un buen  
1956  
[Firma]: Jorge Campos.

Llegaron los cuentos. Bonilla le lleva un abrazo mío.

[La postal lleva dos imágenes de Francisco Lameyer y Berenguer pertenecientes al libro *Escenas andaluzas* de Serafín Estébanez Calderón. Madrid, 1846.]

[7] Ms.<sup>36</sup> AMA C 3-33-6

A Max  
Con el deseo de que  
siga publicando estupendas novelas.  
[Firma]: Jorge C[ampos].

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<sup>36</sup> Escrito al margen y ascendente en un pliego que se convierte en tarjeta en la que en letras de imprenta dice: "Con este cuento ilustrado por Adolfo Estrada, desea JORGE CAMPOS a sus amigos un buen 1965". Se trata del cuento "La otra luna" incluido más tarde en *Bombas...* (Campos 1964b).

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## Preserving the Umbundu Language

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**Abstract-** The present article discusses the current sociolinguistic situation of the city of Kuito, the capital of Bié province, from a historical perspective. It examines the use of the Umbundu language among the inhabitants of Kuito. In addition to presenting historical information of the linguistic contact between the Portuguese and the Umbundu languages, this article also presents the linguistic situation surveyed at the time of the 2014 population census, as well as data from another study that show the diminishing use of Umbundu as a communication language. The older generation had Umbundu as L1, but the younger generation does not.

From the procedures and techniques point of view, this work is configured on bibliographical or documental research, combined with a case study approach. The exploratory research approach consisted of the use of surveys. 135 students of Escola Superior Pedagógica do Bié, in the 2018 academic year, were chosen as our sample group. The objective was to determine the percentages of L1 and L2 speakers of Umbundu and Portuguese.

**Keywords:** first language (l1) - second language (l2) - angolan languages (al) - linguistic contact.

**GJHSS-G Classification:** DDC Code: 306.44 LCC Code: P40



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# Preserving the Umbundu Language

Ana Alexandra Silva <sup>α</sup> & Hermenegildo Pinto <sup>σ</sup>

**Abstract-** The present article discusses the current sociolinguistic situation of the city of Kuito, the capital of Bié province, from a historical perspective. It examines the use of the Umbundu language among the inhabitants of Kuito. In addition to presenting historical information of the linguistic contact between the Portuguese and the Umbundu languages, this article also presents the linguistic situation surveyed at the time of the 2014 population census, as well as data from another study that show the diminishing use of Umbundu as a communication language. The older generation had Umbundu as L1, but the younger generation does not.

From the procedures and techniques point of view, this work is configured on bibliographical or documental research, combined with a case study approach. The exploratory research approach consisted of the use of surveys. 135 students of Escola Superior Pedagógica do Bié, in the 2018 academic year, were chosen as our sample group. The objective was to determine the percentages of L1 and L2 speakers of Umbundu and Portuguese.

The factors that have led to the decrease in Umbundu as a communication language among the inhabitants of Kuito and possible solutions to increase the use of the Umbundu language are also addressed.

**Keywords:** first language (l1) - second language (l2) - angolan languages (al) - linguistic contact.

## 1. INTRODUCTION

Angola, as well as most of the Sub-Saharan nations, is a group of nations with several ethnic groups in plurilingual coexistence. Due to historical reasons associated with a long period of colonial domination, most African countries use only one official language of European origin. That is the case in all Portuguese-speaking African countries, such as Angola, Cape Verde, Guinea-Bissau, Mozambique, and Sao Tomé and Príncipe.

The colonial powers occupied the various Angolan territories and grouped them, giving rise to new territorial configuration, different from the pre-colonial period. Portuguese people, encouraged by the outcomes of the Berlin conference, occupied<sup>2</sup> the

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<sup>2</sup> The occupational wars were called, according to Coelho (2015: 2), "(...) campaigns for pacification of «indigenous», «savage», «primitive» people of Angola."

territories that they deemed to be theirs by right, by the secular contacts previously established, fighting and destroying the territories' socioeconomic and political structures (Coelho, 2015:2). The result of the land division did not consider the ethnolinguistic diversity of the people who inhabited the occupied territories. Angola is a plurilingual, multicultural, and multi-ethnic nation, a reality of great complexity at the linguistic, cultural, ethnic, and policies levels. This brings about the challenge of building national unity while, at the same time, preserving the respect and promotion of diversity (Leite, 2015:7).

The *Constitution of the Republic of Angola*, in its 19th article, defines the language policy of the Angolan State:

1. The official language of the Republic of Angola shall be Portuguese.
2. The State shall promote the study, teaching, and usage of Angolan national languages (...).

As to be expected, the adoption of Portuguese as the official language diminished the importance of the Angolan languages, which has led to a decrease in their usage. Since the formation of the Constitution of the Republic of Angola in 2010, not much has been done to honor the stated language policies. There is still no national language teaching policy that covers all regions of the country. In contrast, the Portuguese language seems to be gaining more and more speakers.

Despite the immense linguistic diversity, in terms of national languages and their dialects, most of the Angolan population, especially in urban areas, speaks Portuguese, the communication and education language. The 2014 general census conducted in Angola shows that 71% of the Angolan population speaks and uses Portuguese as an L1.

As the country is rejuvenating, there is a growing population of Portuguese-speaking individuals and a decrease in the number of Angolan national language speakers. If Angola was inhabited by 26 million people in 2014, that number today will be much higher (data from United Nations agencies show a very rapid population growth).

The annual report of the United Nations Population Fund (UNFPA) on the population state, released on April 2, 2019, and published on the "Observador"<sup>3</sup> website on April 4, 2019, indicates that the population in Angola has almost tripled in the last 15

<sup>3</sup> <https://observador.pt/2019/04/09>.

years, amounting to 31.8 million people, a figure that contrasts with 13.8 million in 1994 and less than half that number of 6.6 million in 1969.

Regarding Umbundu language, Angola's population census conducted in 2014 showed that about 23% of the Angolan population spoke Umbundu, making this the largest ethnolinguistic group in Angola. The following three most spoken national languages are Kikongo, Kimbundu and Cokwe<sup>4</sup>, in that order, and altogether do not exceed, in number, the speakers of Umbundu.

## II. SOCIOLINGUISTIC CHARACTERIZATION OF OVIMBUNDU

The origin of "Ovimbundu" (or Ovimbundo) has been subject of several studies by historians and linguists, such as Soares and Agostinho (2016), with the book *A coleção Ovimbundo do museu nacional, Angola 1929-1935*; Sebestyen (2015) in his book *A sociedade ovimbundo nos relatórios de viagens do húngaro László Magyar: sul de Angola, meados do século XIX*; Childs ([1949] (2020)), in his book *Umbundu Kinship and Character* and Davidson (1981), with the book *The Africans*, among others.

These scholars present various theories about the emergence of the Ovimbundu people in Angola. Their presence in Angola resulted from the movement of the militant Imbangala group that, after arriving in Libolo, established a collaboration that would last for many years with the Portuguese. Later migration and dispersion to the South towards the water springs of the Kwanza led to an ethnic merge, resulting in an association of the autochthonous populations with the Imbangalas. This association resulted in between twelve and twenty independent and autonomous kingdoms that were well-established up until the end of the 18<sup>th</sup> century (Soares, 2014:93).

According to Benvindo (2016:36), the term *Ovimbundu* derives from the semantic evolution of the term *mntu* (*munthu*), which in various African linguistic expressions, takes on the meaning of "person". The author adds that the term *mntu* constitutes the root of the linguistic origin common to the Bantu people (*Banthu* or *Vanthu*). A people who have linguistic similarities and share common traits, tracing their heritage not only to a common linguistic root but also to an ethnic origin, possibly closer than that of other African people.

The Ovimbundu are a people who, until the Portuguese arrived in Benguela, lived on subsistence farming, hunting, and some cattle and small animal husbandry. Later, with the colonial impositions, began marketing agricultural products, mainly maize.

From a social point of view, the Ovimbundu were always a homogeneous people, living in extensive villages and with a great capacity for mobility, so they spread out to various localities. They also had a humble and obedient character, which may have eased their colonial domination. They were taken to several provinces of Angola for forced labor. This integration of the Ovimbundu generated a particular cultural and linguistic "umbundization" in these areas/regions.

In terms of geographical location, the Ovimbundu people reside in territories bordered by other languages, such as:

(...) leste com a Língua Cokwe (província do Moxico); a Norte, encontramos a Língua Kimbundu, (província do Kwanza-Sul), a Sul, a Língua Nhyaneka – Humbi e o Oshihelero, (na Huíla) e ainda a sudoeste, encontramos a Língua Ngangela, na província do Kwando-Kubango. Seguindo a geografia traçada, podemos verificar que o Umbundu se estende, precisamente, em três áreas principais que constituem as três províncias do Huambo, Bié e Benguela. (Costa, 2015: 13-14)<sup>5</sup>

Other people live in the Bié region, namely the Cokwe, the second largest linguistic community in the province.

Almost all national languages in Angola were in contact with Portuguese during the colonial period. In the case of Umbundu, there was contact in the 15<sup>th</sup> century (Costa, 2015: 14) at the beginning of colonial rule in Angola. Through this contact, obviously, a whole process of mutual interference between the two languages in the national territory began. This interference is visible in the expansion and renewal of the lexicon (loans), phonetic modifications of words, and morphosyntactic structuring, among others.

About this, Costa (2015: 58) states:

Depois de vários séculos de convivência linguística, entre o Português e as línguas nacionais, hoje, o Português em Angola transformou-se numa "língua nova", com sotaque próprio, diferente do de Portugal e do Brasil; recorre constantemente a unidades lexicais e a expressões do Kimbundu e de outras Línguas angolanas, sobretudo quando quer expressar factos ou realidades socioculturais que o Português não possui e, às vezes, em determinados tipos de discursos, quando quer produzir efeitos estilísticos, dando ênfase a determinada expressão.<sup>6</sup>

<sup>5</sup> (...) east with the Cokwe language (province of Moxico), to the north, we find the Kimbundu language, (province of Kwanza-Sul), to the South, the Nhyaneka language - Humbi and Oshihelero, (in Huila) and still to the Southwest, we find the Ngangela language, in the province of Kwando-Kubango. Following the traced geography, we can verify that Umbundu extends, precisely, in three main areas that constitute the three provinces of Huambo, Bié and Benguela. (Costa, 2015: 13-14)

<sup>6</sup> After several centuries of linguistic coexistence between Portuguese and the national languages, today, Portuguese in Angola has been transformed into a "new language", with a particular accent, different from that of Portugal and Brazil; it constantly resorts to lexical units and expressions from Kimbundu and other Angolan Languages, especially when it wants to express facts or sociocultural realities that

<sup>4</sup> The three groups represent 22,6% of national language speaker population.



During the initial contact between Portuguese and Umbundu, the dominant idiom maintained an approximation to the standard of European Portuguese, in lexical, phonetic and morphosyntactic terms. Over time, an Umbundu Portuguese (PU) began to acquire characteristics that were increasingly distant from the European Portuguese. Thus, when the population census says that most of the Angolan population speaks and uses the Portuguese language as a means of communication, even in family relations, we must understand it as having its own variants as verified in "Kimbundizado" Portuguese (KP) – Portuguese spoken with solid traits of Kimbundu -, "Bakonguizado" Portuguese (BP) - Portuguese spoken with solid traits of Kikongo -, "Chokwizado" Portuguese (PC) - Portuguese spoken with solid characteristics of Chokwe, etc.

This reality happens not only among those who have Portuguese as their L2 but also among those who, without the solid influence of any AL in their daily life since birth, have Portuguese as the language of communication, distanced, however, from the standard of the EP.

However, it is a fact that the number of AL speakers has been decreasing over time. This increase in speakers of AP (Angolan Portuguese) and the consequent decrease in speakers of AL, contrary to what one might imagine, is a phenomenon that started during colonial times, as Costa (2015:63) confirms:

Já antes da independência, num estudo feito na época, verificou-se que, em Luanda, o número de falantes monolíngues Kimbundu tinha diminuído, favorecendo assim a subida da percentagem de falantes bilingues kimbundu/português.<sup>7</sup>

This same fact is also pointed out by Manuel (2015:14) who, citing various sources, points to the growth of Portuguese as the language of a growing number of Angolans:

O facto de o Português se ter expandido durante este tempo fez com que o número de falantes que adquiriram esta língua como L1 e como L2 aumentasse. Pode ilustrar-se este facto apresentando os resultados de dois estudos. O de Endruschat (1990), que se centra no ano da independência (1975), estima que 1 a 2% da população tinha o português como L1 e 15 a 20% tinha-o como L2, apontando para uma tendência em que a maioria da população tem o português como L2.<sup>8</sup>

Portuguese does not possess and, sometimes, in certain types of discourses, when it wants to produce stylistic effects, emphasizing certain expressions.

<sup>7</sup> Before independence, in a study done at that time, it was found that in Luanda, the number of monolingual Kimbundu speakers had decreased, thus favoring the rise in the percentage of bilingual Kimbundu/ Portuguese speakers. (Costa, 2015: 63)

<sup>8</sup> The fact that Portuguese has expanded during this time has meant that the number of speakers who have acquired this language as L1 and as L2 has increased. Two studies illustrate these results. Endruschat (1990), which focuses on the year of independence (1975), estimates that 1 to 2% of the population had Portuguese as

In certain situations, it is advantageous to use Portuguese as a means of communication because its use will capture a much wider audience than when using only one AL. As Fonseca (2012: 5) points out, some leaders who passed through Angola expressed themselves in their national languages, but only when they went to regions where that language was spoken. If a leader's AL was, for example, Umbundu, he could not go to regions of Northern Angola using his AL, because he would be understood only by a small number of people, which could be interpreted as a lack of respect.

The studies made by Manuel (2015:14), citing several authors, show that in 2014, 42% of the population under nine years had Portuguese as L1. In the age group between 10 and 19 years percentage was 34%, which clearly shows the increasingly accentuated growth of Portuguese as the top language in communication among Angolans, with a consequent decrease in the use of AL.

From early on, the existence of an official language was understood as a factor of unity and cohesion among people. Adopting of a single language that unites different people within the same territory was a good strategy to achieve this goal. (Fonseca, 2012:4).

### III. L1 AND L2 OF KUITO'S INHABITANTS

The mother tongue (L1) of an individual is the language spoken at home by close relatives and in the surrounding community. It is not necessarily the parents', grandparents', or any other local language. In Angola it is not unusual that different national languages coexist in the same community, and that is the case of the city of Kuito.

For a language to be considered a speaker's L1, it must be part of the speaker's thought process, for it is in this language they think, talk, argue, or refute about the most diverse aspects of human life. A reasonable understanding of a particular language does not make it the L1 of a speaker.

Although, in the distant past, Umbundu was the language most spoken by the natives of Kuito, after independence, there was a reversal of this trend, aggravated by the Angolan government's decision to elect Portuguese as the official language. To speak Portuguese boosts citizens' integration into the formal realm of society, making it easier to gain employment and facilitate contact between people of different origins and ethnic groups.

The armed conflict that devastated the country for almost three decades had a strong influence concerning this issue, as there was an inevitable polarisation between the belligerent forces. To seek dividends, the people of the Ovimbundu region were, to

their L1 and 15 to 20% had it as their L2, pointing to a trend whereby most of the population has Portuguese as their L2. (Manuel, 2015: 14)

some extent, associated with the UNITA "rebels" since it was the region of origin of the majority of their leaders and where that political organization had always had the greatest influence. Thus, to speak Umbundu, in certain parts of Angola, had a negative connotation. People living in the government-controlled areas became accustomed to pejoratively calling any person from the South of the country "Bailundo"<sup>9</sup>. These were associated with being a soldier or militant of UNITA. This reality lasted for decades and there were even parents who did everything in their power so that their children would never learn any word in this language, a fact that also contributed to an inevitable weakening of this language's use.

One of the signs that indicate the decadence of a language is the decrease in the number of speakers, the lack of renewal of its demographic stratum or the undervaluation of such language in detriment of another overvalued one, raised as the privileged code in communication. This phenomenon is called substitution, as one linguistic code replaces the other.

This decline is evident in data collected by INE in the 2014 population census, which shows that 23% of the Angolan population used the Umbundu language as means of communication at home. These data, of

course, do not indicate the exclusive use of Umbundu, but rather, often, a parallel use.

We thus see the confirmation of bilingualism (with some cases of diglossia<sup>10</sup>), with the use of Portuguese filling most of the communicative space. This phenomenon, named linguistic alternation, occurs, in the words of Lopes (2011), in an asymmetric power relation, with a disadvantage to the minority language.

#### a) Case Study

A survey was conducted to achieve a clearer perspective of the linguistic context of Kuito's inhabitants. The instrument was given to parents, guardians, teachers, and students residing in this municipality. The survey was sent via *Whatsapp* and *Messenger* to 30 parents/guardians of 37 children, aged between 5 and 10 years old; to 40 teachers from different primary and lower secondary schools, who teach a total of 875 students. The survey was also given to 135 college students of the Escola Superior Pedagógica do Bié. Only 17 parents (56.6%) responded to the survey, while the percentage of teachers who sent in response was slightly lower, at 52.5%, as shown in Table 1.

Table 1: Population and Sample

Parents/Carers		Primary School Teachers		University Students	
Population	Sample	Population	Sample	Population	Sample
30	17	40	21	405	135
	56,6%		52,5%		33,3%

From the parents' survey, it was possible to find out that only four parents (23.4%) taught their children some words of Umbundu language. Despite this, no children use the Umbundu language as a communication tool. Regarding the data sent by the teachers, only one speaks fluent Umbundu (4.7%). The percentage of pupils who speak Umbundu is not significant, since only 51 of the 875 pupils communicate in this AL, which is equivalent to only 5.5%.

If we consider that there is a rapid rejuvenation of the Angolan population, one can assume that there is a slowdown in the use of Umbundu. The data produced by the population census (INE, 2016), show that the population of Bié, in the age group between 0 and 14 years, is approximately 51%, the second highest in the country, which has an average of 48%.

This demographic factor exerts a significant linguistic influence, since the older populations tend to retain more of the AL or, at most, the mastery of Portuguese and its AL, in contrast the younger ones dominate almost exclusively the Portuguese language.

As is known, one of the elements that threaten the weakening or disappearance of a language is the death of its speakers, acculturation, and the inhibiting linguistic policies of the dominant authorities. So, what to expect from a language without literature or bibliography worth mentioning? What can we expect from a language that is neglected as means of communication between parents and children? What will happen when a large part of the population that speaks it disappears through the dialectics of life? For the time being, we can point to its weakening because of its increasingly limited use. If this tendency continues, over time, AL may even disappear.

Teachers were asked the following questions:

1. How many students do you have in your class?
2. What is the age range of your students?
3. How many of them speak Umbundu and can keep a fluent conversation of at least 30 minutes, on any topic?

<sup>9</sup> Name of a municipality in Huambo province, therefore, found in the Ovimbundu region.

<sup>10</sup> According to Lopes (2011: 64-66) a community is diglossic when two varieties of a same language coexist within it, both not being too differentiated but also not so close.

The results of this survey are described in Table 2:

*Table 2:* Language reality of the 4th generation students

Respondents Teachers	Umbundu-speaking teachers	Pupils allocated to teachers	Umbundu-speaking students	Students who do not speak Umbundu	Percentage of pupils who do not speak Umbundu
21	1	875	51	824	97,6

The age range of the pupils taught by the teachers surveyed is between 6 and 25 years. Only 4.7% of the teachers speak Umbundu. The percentage of pupils who speak it is 2.4%, revealing a clear trend of decline in the use of this language.

Paradoxically, political discourses tend to defend the preservation of the Umbundu language, despite the controversies alluded by Benvindo (2016) regarding the necessary implementation of Angolan National Languages in the school system. Such a fact is positive. We fear, however, the different phenomena linked to linguistic contact, as pointed out by Gomes (2015:41):

Nos casos em que há abandono de uma das línguas, as forças sociais e políticas exercem grande pressão para o retorno ao monolinguismo. Esse tipo de contacto linguístico ocorre, muitas vezes, entre uma língua oficial e majoritária e línguas com um número relativamente baixo de falantes – línguas étnicas, línguas regionais, línguas de imigrantes, etc. Grande parte dessas línguas não possui tradição escrita e muitas ainda sequer foram descritas. Trata-se muitas vezes de populações marginalizadas, pertencentes a comunidades linguísticas frequentemente dispersas, cujas línguas possuem baixo prestígio social na sociedade mais ampla em que estão inseridas.<sup>11</sup>

Some elements mentioned by the author deserve attention, as they show the increasingly fragile reality of the Umbundu in Kuito. There is some pressure of the Portuguese language (in this case, the official and primary language) on the Umbundu language (regional and less used/secondary). The latter has a fragile written tradition, but thanks to the decisive intervention of Catholic and Protestant missions, its written form can still be found in Bibles translated for the region.

Gomes (2015: 43) quotes McMahon (1994) to refer to the death or extinction of a language. The process is not instantaneous; it takes time, as can be gauged:

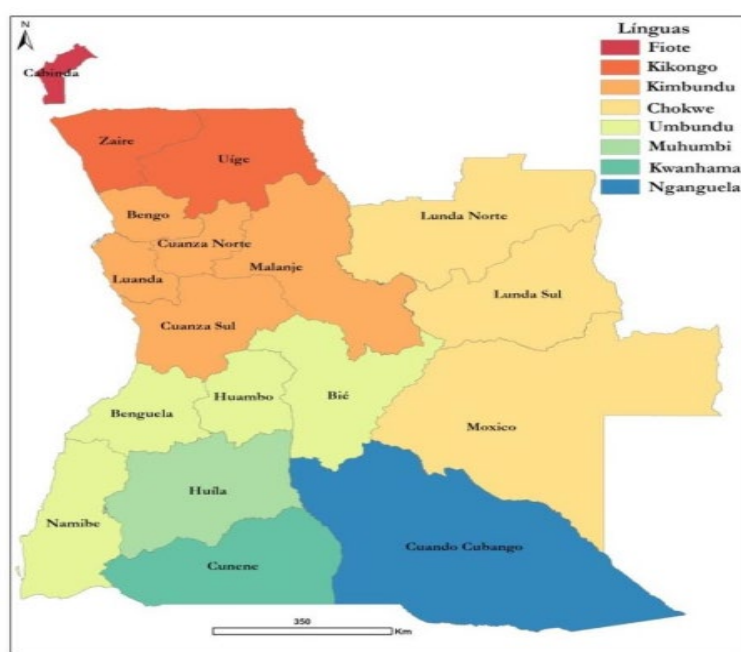
<sup>11</sup> In cases where one of the languages is abandoned, social and political forces exert tremendous pressure for a return to monolingualism. This type of language contact often occurs between an official and majority language and languages with a relatively low number of speakers - ethnic languages, regional languages, immigrant languages, etc. These languages have no written tradition and many have not even been described. These are often marginalized populations, belonging to often-dispersed language communities, whose languages have low social prestige in the wider society in which they live. (Gomes, 2015: 41)

A “morte” de uma língua envolve essencialmente mudanças linguísticas “normais”, mas motivadas por razões sociolinguísticas particulares. Em geral, ocorre uma transferência de fidelidade de uma parte da população da língua nativa para uma língua introduzida mais recentemente, na qual os falantes se tornaram bilingues. Esta nova língua é em geral falada nativamente por falantes com maior poder econômico/político, prestígio e muitas vezes mais numerosos. A língua nova está frequentemente associada a novas tecnologias e a uma cultura que se apresenta como mais desenvolvida. Essa língua é então associada à riqueza e ao progresso o que faz com que os falantes abandonem gradativamente a língua nativa, que passa a ser usada em contextos cada vez mais reduzidos até ser totalmente substituída pela língua introduzida.<sup>12</sup>

It is clear, therefore, that despite having persisted for several centuries, AL and, in the case of this study, the Umbundu language, is not safe from the possibility of extinction, as evidenced by its gradual weakening due to the gradual reduction in the number of speakers. This reduction is due to either natural reasons<sup>13</sup> or the discredit caused by the lack of use in school or official contexts. Any measure to reverse this situation would involve increasing its prestige, which would imply its use in school contexts. Figure 1 accounts for the Ethnolinguistic map of Angola.

<sup>12</sup> The ‘death’ of a language essentially involves ‘normal’ linguistic change but are driven by sociolinguistic reasons. In general, a transfer of allegiance from part of the population of the native language happens to a more recently introduced language in which speakers have become bilingual. This new language is generally spoken natively by speakers with greater economic/political power and prestige. The new language is often associated with new technologies and a culture that presents itself as more developed. This language is then associated with wealth and progress, which causes speakers to gradually abandon their native language, which is used in increasingly reduced contexts until it is completely replaced by the new idiom. (Gomes, 2015: 43)

<sup>13</sup> Here we call natural reasons for the disappearance of the older population which is the centripetal force for the preservation of the language.



Source: INE 2014:51

Fig. 1: Ethnolinguistic map of Angola.

The results of the survey applied to university students also illustrate our concern. We will now detail the characteristics of the sample: of the 135 students, 98 are male (72.5%) and 33 are female (24.4%). Four

students did not specify their sex, so there is a percentage of 2.9%, which does not fall within any of the parameters described above. The information can be visualized in Figure 2.

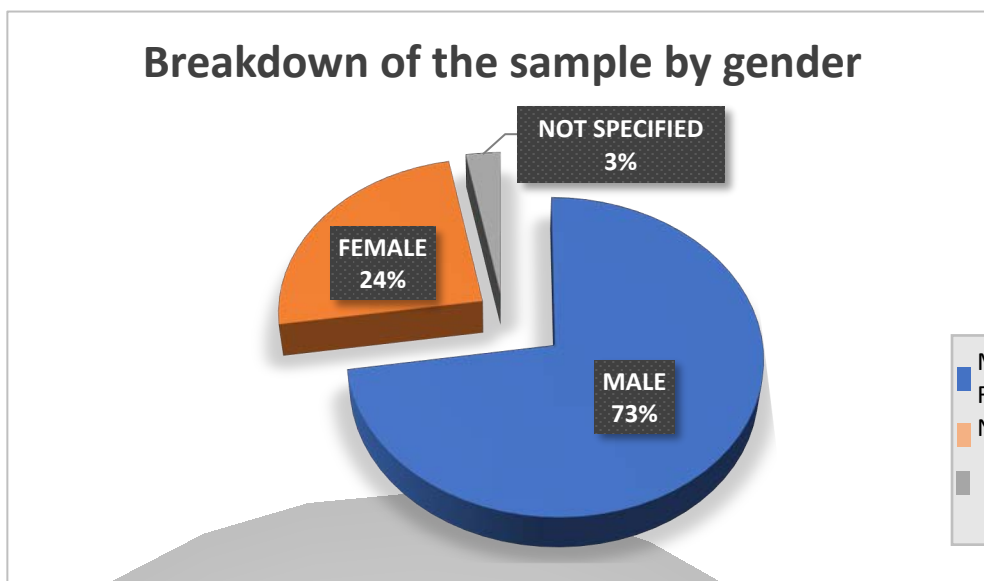


Figure 2: Breakdown of the sample by gender

The age range of the sample members (Figure 3) was established based on the minimum age required for entry to higher education. The information has an interval character. Thus, the minimum age is 18, and the maximum is 50. The following frequencies are observed in the selected sample: 126 individuals (93.3 %) are between 18 and 30 years old; six students (4.4%) are

between 30 and 40 years old; no student is over 40 years old. Three people (2.2%) did not specify their age.

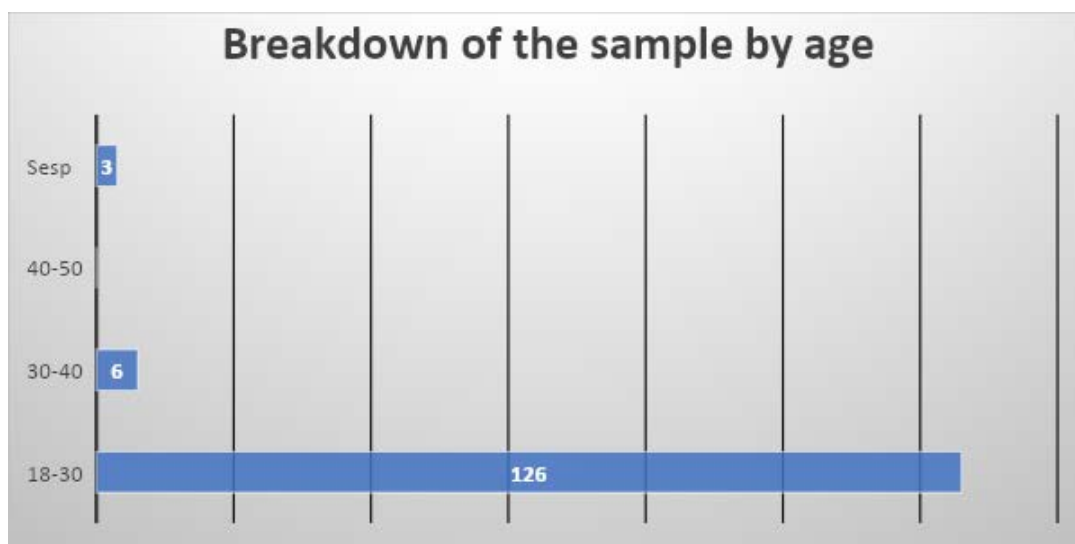


Figure 3: Breakdown of the sample by age

As for the variable of L1 (Figure 4), the selected sample presents the following picture: 102 students (75.5%) have Portuguese as their L1. 31 students (22.9%) have Umbundu as their L1. Only two students (1.48%) do not have either of the languages mentioned above (their L1 is Nganguela).

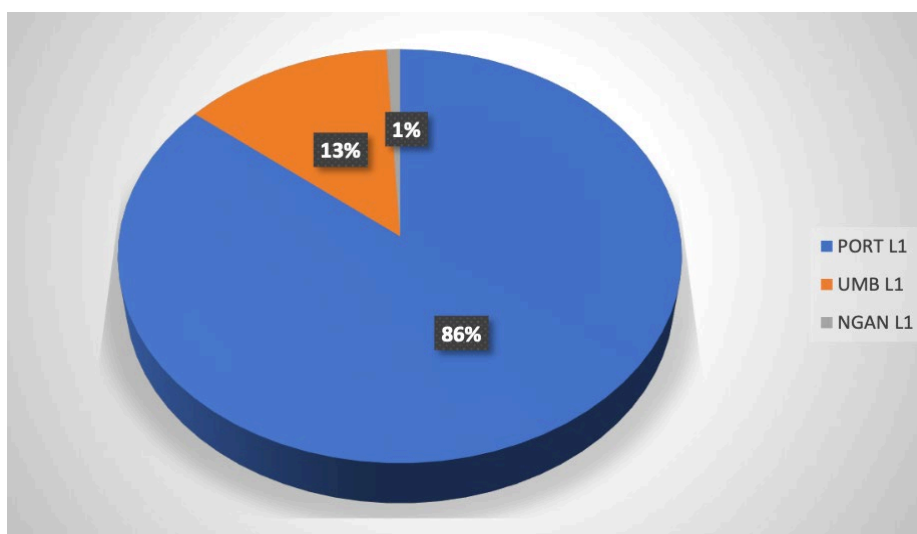


Fig. 4: L1 of the students

When we sought to know the L2 of the members of the selected sample, the bilingual context, familiar to a large part of the Angolan population, became evident. With regards to the ESPB students, 79 out of the 135 members of the sample (58.5%) have an L2: 71 students (52.59%) speak Umbundu; eight individuals (5.9%) have English as their L2<sup>14</sup>. The remaining 56 students (41.4 %) do not have an L2. Figure 5 illustrates these data:

<sup>14</sup> This phenomenon of the English Language being L2 is given to the fact that we have, in Angola, a high number of citizens that, due to war, have lived in the neighbor Republic of Zambia and are now back in the country.



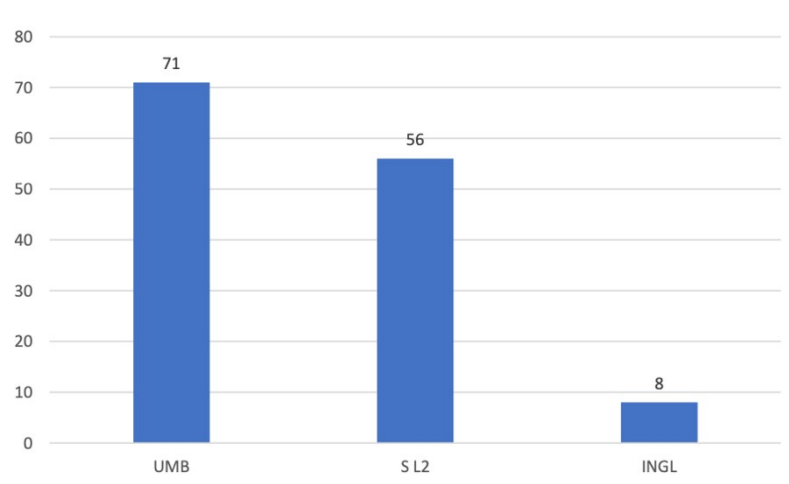


Fig. 5: L2 of the student

If we want to give a generational<sup>15</sup> treatment to the data collected from the survey applied to students at the ESPB (Graph 1), we would divide it in the following way: 1st generation (Grandparents) - over 60 years old; 2nd generation (parents) - between 30 and 60 years old; 3rd generation (children) - between 0 and 30 years old. Crossing the age of the respondents to the duration of

the generations show that 132 individuals belong to the 3rd generation. There are no 1<sup>st</sup> generation students in our sample. From the information gathered, one can deduce that the Umbundu language is in disuse, because each subsequent generation uses it less and less. Figure 6 below distributes the results obtained by age and the respective percentages:

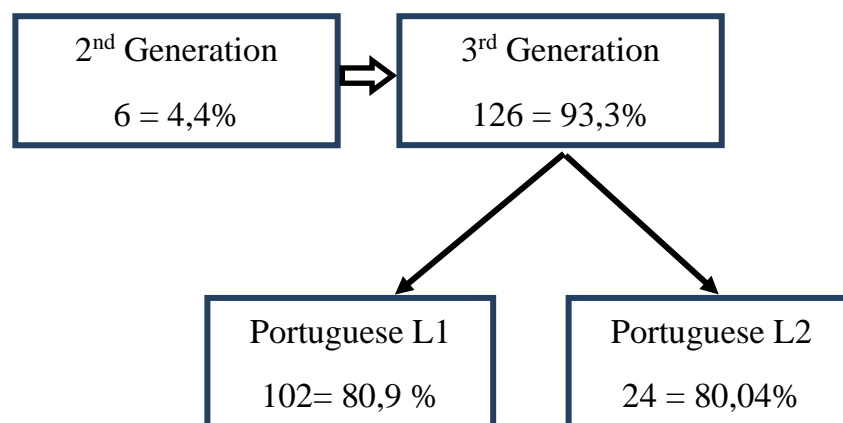


Fig. 6: Percentage of ESPB students by generation.

From the data above, one can foresee that in the transition from the 3rd to the 4th generation, there will be a further weakening of the Umbundu language, which will change from L1 to L0, ceasing to be a language of communication for the younger generations.

Table 3 gives details of the language status of the students surveyed. The abbreviations indicate the order of the languages, i.e., PU - indicates Portuguese as L1 and Umbundu as L2; UP - indicates Umbundu as L1 and Portuguese as L2; P - indicates that the speaker

only speaks Portuguese; OP - suggests that the speaker has another language as L1 and Portuguese is their L2.

<sup>15</sup> Despite the debate around it and according to Comte (1998), Dilthey (1989) and Mannheim (1993), a generation can be understood as a group of people that is born in the same historical period that possess a shared identity, or people that succeed their parents. In this strict sense, a generation can be a period of 25 to 30 years (Comte, 1998). In this study we consider the first generation individuals between 50 and 75 years old, the second generation individuals between 25 and 50, and the third generation individuals between 0 and 25 years.

Table 3: ESPB students' linguistic situation, according to age group

18-30				30-40				40-50			
PU	UP	P	OP	PU	UP	P	OP	PU	UP	P	OP
77	11	36	2	5	1	0	0	0	0	0	0
57.0	8.1	26.6	1.4	3.7	2.8	0	0	0	0	0	0
3%	%	%	%	%	%						
126				6				0			

Data analysis shows that almost 80% of the speakers of Umbundu lose out to Portuguese. This means that nearly 80% of future parents will influence their children to speak Portuguese, as it is their L1.

*b) Ways to preserve Umbundu as the L2 of Kuito's population*

It makes sense to resort to the Universal Declaration of Collective Rights of People, approved in May 1990 in Barcelona, which states that all people have the right to express and develop their culture, their language, and their organizational rules through their own political, educational, communication and public administration structures. It is, therefore, necessary that political authorities preserve the languages spoken in Angola. Umbundu, and all other AL languages, confer a very particular identity to their users. The postulate above is supported by the Universal Declaration of Human Rights of 1948, which affirms the dignity and value of the human person, who is granted equal rights and all freedoms, without distinction of race, color, sex, language, religion, political, national or social origin, fortune, birth, or any other condition.

In the Angolan context Portuguese has been superimposed over national languages. Umbundu, previously considered L1 in the city of Kuito, has lost its position in favor of Portuguese, which has seen its protagonism rise with increasing intensity. It is expected that other municipalities in the province will also suffer the same phenomenon, albeit more slowly.

The faster disappearance of the Umbundu language in Kuito is due to three factors:

1. Great contact of the indigenous population with people of other cultures and languages, a reality of the cities, which does not happen so markedly in the interior regions;
2. The advance of schooling in Kuito, including the emergence of universities<sup>16</sup>, which requires students to have a higher mastery of the Portuguese language;
3. The decreasing use in informal and familiar environments of the Umbundu language, motivated by prejudice, and by the scarce use of it in the media and social networks, for example.

<sup>16</sup> At the present moment, there are two university public schools and two private ones, being predicted the inauguration of one more.

We argue that efforts should be made so that the Umbundu language is preserved as L2 of the Kuito inhabitants, thus safeguarding the values related to the cultural identity of this population. For such, we point out some ways:

1. Umbundu must become a language of scientific scope, having as a launching point available studies and publications. To this end, Umbundu should incorporate a range of new terms related to science, technology, philosophy, and the world of knowledge. Linguists and scholars of the Ovimbundu culture will play a relevant role in giving this language a scientific and academic scope.
2. On the other hand, the Angolan education authorities should, under Article 9º (3) of the *Constitution of the Republic of Angola*, confer on Umbundu the status of a language of instruction. Initially only for primary education, up to grade 6, but later extending it to the whole education system. The aim is not to study Umbundu as a subject within a curriculum but to study all subjects in this language.

The Angolan government has been testing measures for the incorporation/introduction of the national languages into the educational system, aiming at their preservation. These studies and trials have been going on for several decades, but there are still no concrete results. The reasons are many, but we can highlight the lack of adequately trained teachers, the lack of bibliographic materials, and the existence of several Angolan languages in the same province. These three factors constitute an obstacle to the insertion of national languages in the education system, as intended. Nevertheless, we advocate the possibility of doing so if there is a will and more accurate work.

## IV. CONCLUSION

Our approach demonstrates the sociolinguistic reality of Kuito, a reality that has been characterized and influenced by the coexistence and interactions between the Umbundu and Portuguese languages for over 500 years. The coexistence between the two codes, for over 500 years, and the influence that the languages exert over each other are determining factors in this sociolinguistic characterization of Kuito.

There is a real risk, which cannot be underestimated, of Umbundu disappearing. Such possibility derives from the increasingly less frequent use, the poor transmission of this language to younger generations, and the gradual aging and consequent disappearance of the generations that had it as L1. The postponement of its insertion in the education system is only one more risk factor for the disappearance of Umbundu, in the long term.

To reverse this situation, we recommend that a laboratory for the study of the Umbundu language must be created. After that it should be included in the education system, to enrich its lexical, semantic and morphosyntactic parameters, so that it becomes possible to use it as a language of schooling, thereby raising its prestige, and contributing to its preservation.

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## Hasten Slowly, Avoid Zero Error Syndrome and No Reaction Time

By Md Mohidur Rahman

*Introduction-* Hasten slowly' are two simple antonymous words consisting of a simple self-contradictory statement laden with the grave meaning of life. It is surprising that two words of opposite meaning are juxtaposed together to erupt the curiosity of the readers about its use and function. The word 'Hasten' is the verbal derivative of the word 'haste', denoting the meaning of the word 'quicken'. What is about 'slowly'? It epitomizes the reverse meaning of the word 'quickly.' So, what does the statement mean? It connotes the sense of doing anything quickly, meticulously, and sincerely. It is the trek of hurriedness with sincerity and dedication. Thus, the expression 'hasten slowly' goes opposite to the sense of the two heinous trends of the modern era – "zero error syndrome" and "no reaction time." These two unnecessary evil tendencies pave the way to the suffocation of today's people de-capacitating their work spirit and diminishing the work standard. Thus, 'hasten slowly' should be positively nurtured to eliminate these two phrasal expressions of morbid mindset.

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Md Mohidur Rahman

## I. INTRODUCTION

*'Hasten slowly' are two simple antonymous words consisting of a simple self-contradictory statement laden with the grave meaning of life.*

It is surprising that two words of opposite meaning are juxtaposed together to erupt the curiosity of the readers about its use and function. The word 'Hasten' is the verbal derivative of the word 'haste', denoting the meaning of the word 'quicken'. What is about 'slowly'? It epitomizes the reverse meaning of the word 'quickly.' So, what does the statement mean? It connotes the sense of doing anything quickly, meticulously, and sincerely. It is the trek of hurriedness with sincerity and dedication. Thus, the expression 'hasten slowly' goes opposite to the sense of the two heinous trends of the modern era – "zero error syndrome" and "no reaction time." These two unnecessary evil tendencies pave the way to the suffocation of today's people de-capacitating their work spirit and diminishing the work standard. Thus, 'hasten slowly' should be positively nurtured to eliminate these two phrasal expressions of morbid mindset.

## II. SLOW AND STEADY WINS THE RACE

The sentence 'Slow and steady wins the race' is a universal proverbial statement. Everybody accepts it without much criticism. It is also a perpetual fact. Doing something slowly and steadily renders the best output as thoughts and actions, being interlinked together, can work harmoniously and spontaneously. If an action is accomplished thoughtfully and deliberately, it becomes outsmart and fruitful. There is no doubt about it. It also becomes effective. That is why; Sophocles in 'Oedipus the Rex' says that the quickest thoughts are the seldom safest. He means that the quickest thoughts cannot be commensurate with the course of action. As such, the outcome of the action cannot be upto the utmost satisfaction. Shakespeare also has the same sonorous soprano in 'Romeo and Juliet' saying that a man in hurried action falls as a reaction. The action without deliberate thoughts can be hazardous or less standardized. So, a man should, in no way, be unnecessarily hurried while discharging his duties. Rather, he should do any job deliberately and astutely.

But the most problematic issue lies in another context. What can be the output when a man has to do something under the grim pressure of a huge number of diversified commitments without adequate time? It will simply be a hodge-podge. The situation gets more devastating and indescribable when he is sourly ogled by the eyes of his superior to do anything without any error and without any reaction time. At that time, the pulsation of the person going to discharge the duties increases uncontrollably, and he falls into great perplexity and mesmerization. The 'no reaction time' and the 'zero error syndrome' are two sickly diabolic forces in the modern era that minimize the work spirit, lessen the work rate and degrade the work standard.

## III. THE NECESSITY OF PROMPTNESS AND STEADINESS

It is for sure that modern age is the age of science and technology. That is why, the statement 'slow and steady wins the race' is now half-truth and obsolete. Rather, everything undergoes great momentum. There is no way to be slow and steady as man reaches the supersonic or hypersonic speed. Slowness is a stale issue. Only the fittest with the promptness and steadiness can survive in this age while the slowness and sluggishness are to be eliminated over the time. But it is the human being, not beyond the limitation or drawback. Napoleon Bonaparte says, "Everything is possible by man and impossibility is a word to be found in a fool's dictionary." It is correct, but it is un-denying that the standard of doing any work is directly proportional to the reaction time a man takes. The more reasonable time he takes, the more quality of the work he can ensure. Besides, if he remains free from the panic of making mistakes, he can give his best effort, and thus, provide quality output. But in today's world, we are so hurried under multifarious grim pressure that we can't be steady nor concentrate on a particular point. That's why; Mathew Arnold, in his famous poem 'The Scholar Gypsy', said that our thoughts are thousand times divided and we are always restless. As a result, we can't render our best output. Same tone about the people of today's world is also tuned in T. S. Eliot's famous poem, "The Love Song of J. Alfred Prufrock." The poet said that modern men are restless for trivial things and futile thoughts. As such, they cannot be effective in materializing their plan.

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#### IV. TO ERR IS HUMAN

'To err is human' is a worldwide universal truth. Nobody can deny nor refute it. 'Man can mistake' is quite natural. Mistaking is an integral part of human life. There is no doubt about it. Those working more may make more mistakes and commit more flaws. Making a mistake is nothing new for human beings. Instead, committing no error is unnatural and unexpected. An error is not an offense as an offense is related to intentionally doing anything undesirable and unwelcoming. But, in today's world, nobody wants, nor even is ready to accept any mistake at any cost or give adequate time to do any job smoothly. Everybody expects things to be done overnight and flawlessly. Thus, the ultimate result is accelerating heart beats, increasing tension rate, and deteriorating health hazards. That is why; no work is getting standardized upto the mark. Every assignment is undergoing a pathetic fallacy. So, it is an affable clarion call to all of us to come out of the existing notion and relentlessly follow the norms of 'Hasten Slowly,' that is, not doing now without any reaction time, instead of doing hurriedly but deliberately and contemplatively, avoiding the mistakes as many as possible or without any error if possible. To do once, never twice, or thrice is the motto of every action. In this regard, setting the standard should be the prime focus. Consistently scoring ten out of ten is not the standard or motto of doing anything. Then, the quality will fall down. Instead, six out of ten should be the expected level, and then, the natural course of action can ensure the best get.

#### V. KAZI NAZRUL ISLAM'S VIEW

Our national poet 'Kazi Nazrul Islam' in his "Jouboner Gaan", said that he is in the group of contemplation, not action. Contemplation behind every action works like the blood in the human body beyond human visibility. Action and contemplation are two ever-inseparable sides of a single coin. An action without contemplation is a boat in the vast ocean without a rudder. But in this era of supersonic speed, there is no business of contemplation nor any reaction session. We always believe in action, not in contemplation or thinking deeply. Just doing the work like a machine is the devastating trend of the modern age. That is why; the work standard sometimes deteriorates abruptly to a greater extent. There is no time for today's people to take a nap or fall the sigh even. They are panting and doing the work without any respite diminishing even the vitality of their life.

#### VI. LIFE IN DEATH IS MORE SUFFERABLE THAN LIFE OR DEATH

T.S. Eliot, in his poem 'The Waste Land,' describes the suffocation of Sybil, a beautiful

mythological lady. She was punished for her betrayal with the sun god 'Apollo' who endorsed her exemplary punishment. Once, the god (Apollo) fell in the deep love with Sybil and wanted to marry her. Thus, he asked her what she wanted to be in her life. She wanted only to be immortal and he (Apollo) granted her immortality as he desired to take her as his beloved for her paragon beauty with the pagan eyes. She was a lady with a tall figure like a beautiful goddess. But when she denied being the beloved of Apollo, she was punished. She was kept inside a bottle hanging her by its cork, tightly attached. There was no air passage in that bottle, and thus, Sybil was suffocated. She couldn't live nor even die because of her immortality. As a result, she was there in a life-in-death condition. When the cowboys came with their herds and asked Sybil what she wanted in her life, she answered she wanted to die only. The reason is that she was in a life-in-death condition, that is, more sufferable than life or death. Living with the crouching effect of tension, anxiety, etc is as sufferable as the dying state of Sybil. But life-in-death is more sufferable and agonistic than living or dying. The two intangible facts, 'zero error syndrome' and 'no reaction time' in the critical age of sighs and suffocation, act as the catalyst to create such a life-in-death condition in human life that it eventually degrades the work standard or the quality of jobs.

#### VII. CONCLUSION

Working is an art. Many people can do the same work in many ways, following their artistic style. For this, the quality of work may vary from man to man. Somebody can do a job as quickly as possible, some may take more time, and some may make a few mistakes, some more. It depends upon their capacity and capability. But it is accurate and universal that the quality of a job can best be ensured if a man can do it without any apprehension of committing any error and with adequate time, whatever is needed. It is because he gets the scope to ponder over it. He can deliberately make a plan and then execute it soundly. But if he does it hurriedly without any thought or contemplation, definitely its quality will go underneath or degrade. He may make the most probable mistakes, which many of us in today's busiest world are not ready to accept. That is why; many litterateurs in different literature depict the point with immense prominence. So, if we can accept the errors of doing any work to a certain extent and give some relaxation time, we can expect more quality output in turn.

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## Current Issues and Challenges in the Acquisition of Office Technology and Management Education Skills in Federal College of Education (Technical), Asaba

By Ojianaegbu, Idowu

*Federal College of Education (Technical)*

**Abstract-** This paper examined the current issues and challenges facing the acquisition of OTME skills in Federal College of Education (Technical), Asaba. Office Technology and Management is a synergy of three distinct words office, technology and management. It is a well-established fact that advances in technology has affected different professions with a view to meet global trends in higher productivity, speed networking and excellent packaging. Accomplishing the routine tasks with machines is known as automation. To this end, this paper examines inter alia the concept of office technology and management, the concept of skills, importance of acquiring OTME Skills in Nigeria skills available in OTME, and issues and challenges in the acquisition of OTME skills. This paper concludes that no meaningful OTME skill can be acquired in colleges of education without adequate provision of facilities, manpower and equipment needed in OTME departments to meet the changing needs of the society and workplace.

**Keywords:** *current issues and challenges, acquisition, office technology and management skills.*

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**Keywords:** current issues and challenges, acquisition, office technology and management skills.

## 1. INTRODUCTION

The globalization of the world engineered by internet, and office automation has influenced the ways, means and scope of the functions of Office Technology and Management graduates. Across the world, and indeed, in Nigeria, professions of all kinds are fast adapting to challenges of changing situations. In the past, Office Technology and Management practice was only limited to very few operations like receiving people on business visit to the organizations, typing of official letters and memorandum, and other routine tasks. With the increasing volume of management operations, there is need for speed, accuracy and elegance in office management practice (Eke and Falahan in Osamade. 2017).

In the recent times, The National Board for Technical Education enhanced the objectives of secretarial training. Hence, the nomenclature changed to office Technology and Management. This affected

both the curriculum of Colleges of Education and Polytechnics. The Polytechnic curriculum composes of four main components for both National Diploma and Higher National Diploma hence, General Studies/ Education Foundation courses, Professional courses, SIWES. The professional courses are courses which give the student the theory and practical skills he/she needs to practice as a secretary. This may account for between 60% to 70% of the contact hours of study.

To Agboola in Nwalado and Ezoem (2019) greater prominence is given to ICT courses that shorthand and keyboarding: which had credit hours drastically reduced. The purpose is to actualize the demand for supply of manpower that have appropriate office skills and competences to manage office new technologies to profit the organization given the current wave of information communication technology.

The Office Technology and Management Education (OTME) career encourages employment creation given multifaceted skills embedded in it including: reprographics, word processing. Micro-graphics, telecommunication, data processing and others. Merriam Webster Dictionary (2013) explains skill as ability coming from one's knowledge practice or aptitude to do something well. Etoneyaku in Onyesom (2019) added that it involves practical knowledge in combination with cleverness, expertise, dexterity and ability to perform a function which could be acquired or learnt in school.

There are areas which require immediate attention as standing on the perception of Aina in Osamade (2021) that business education inculcating OTME is concerned with development of Individuals, personal skills and attitudes, communication and occupational skills. Technological literacy, employability skills, broad specific occupational skills and knowledge. Oladunjoye (2015) asserts that the products of a deficient curriculum cannot function effectively and efficiently in today's consistent change in the work environment.

Computer studies were first examined at SSCE level – WAEC in 2014 and have become optional in SSCE. The basic Education at JSS level is exclusive of shorthand but optional in Secondary School. The revised edition of the Federal Republic of Nigeria (2014) outlined that the acquisition of appropriate skills, abilities and competencies both mental and physical as

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equipment for the individual to live in and contribute to the development of the society. The objective of each level of education is to give the individual a climbing stone to a higher level. Where the secondary school curriculum is inadequate, it cannot prepare students for useful living and solid higher education. It is obvious that there are various challenges facing acquisition of Office Technology and Management Skills. Thus, this study intends to examine the challenges in the acquisition of Office Technology and Management Skills in Federal College of Education (Technical) Asaba, Delta state.

## II. OFFICE TECHNOLOGY AND MANAGEMENT

Office Technology and Management is a synergy of three distinct words, office, technology and management. The word office is a description of a place in which business, clerical, or professional activities are conducted. Amos in Osamade (2017) noted that the historical evolution of the office is as old as the ancient civilization and the evolution of man because human brain itself has been functioning not only as think-tank but also as the reservoir of knowledge, innovation, skills and information. The author stated that human brain has long being recognized as a channel for processing, storing, dissemination and retrieval of information. An office simply means a professional place for work. Technology enables an organization to manage its operations efficiently and create a competitive advantage. Technology is the application of scientific knowledge for practical purposes. It involves the use of machineries and devices developed from scientific knowledge to make work easier and faster (Microsoft, 2010). The management component refers to the art of getting things done through people.

Office Technology and Management, according to Eneche and Audu in Obiajulu (2017), is the planning, organizing, directing and controlling of office activities to ensure that various resources (human and materials) are put into optimal utilization so as to achieve the organization. Amos in Osamade (2017) also sees office technology and management as the branch of management which is concerned with services of obtaining, recording and analyzing information. Office Technology and Management Education (OTME) is formerly referred to as secretarial studies in Nigeria. It evolved out of the need to meet the technological and managerial demands of today's workplace. The name OTMEE was approved by National Board for Technical Education (NBTE) in 2004: Office Technology and Management Education (OTME) programme was designed for two major reasons. As stated by Adelakin in Osamade (2017) first, as a response to the yearnings of the secretarial studies students and practitioners on the need to change the name of the programme as their products are only suitable for the traditional office environment. Secondly, as a result of the change in

curriculum with more emphasis on Information and Communication Technology (ICT), managerial and entrepreneurial competencies so as to enrich the knowledge of the students and equip them with necessary skills needed in today's modern office environment. Udo in Osamade (2017) noted that OTME is a comprehensive activity-based educational programme that is concerned with the acquisition of office technology and management skills, understandings, attitudes, work habits and competencies that are requisite to success in secretarial and office management occupations. The OTME programme is a career training or education to ensure that an individual is career ready with the right skills and attitudes needed for transition from school to work or for advancement in the OTME career path.

Office Technology and Management Education Programme as outlined in National Commission for Colleges of Education (NCCE, 2012) is designed to equip the students with relevant knowledge, skills and competencies needed to function as office workers, teachers and entrepreneurs, OTME students at their final focus on courses that will make them master their area of specialization. OTME programmes aims at providing the business world with highly skilled and knowledgeable workers who will manage information efficiently, effectively, being well equipped with a comprehensive range of skills including managerial, technological and communication skills (Adelaken in Nwosu, 2010).

## III. CONCEPT OF SKILLS

A skill is the learned capacity to carry out pre-determined results often with the minimum outlay of time, energy or both Osammade (2017) Skill usually requires certain environmental stimuli and situation to assess the level of skill being shown and used. The word skill has been viewed by many authors. Homby (2012) views skill as the dexterity in doing things or in performance or in application to practical purpose, and ingenuity, wisdom and knowledge in carrying out u function. Tonne, Popham and Freeman in Ekwue (2013) viewed skill as ability to use ones' knowledge effectively and readily in execution or performance: technical expertness; a power of habit of doing any particular thing competently. This definition stresses that skills are based on using knowledge; the objectives is to bring knowledge to the level of competency. Tonnel et al in Obi (2011), defined skill as the ability to use one's knowledge effectively and readily in performing an act, or a habit of doing a particular thing competently. In addition to the above, Hull in Obi (2011) defined skill as manual dexterity acquired through repetitive performance of an operation. According to Oxford dictionary, the term "skill" refers to the ability to do something expertly and well. Skill is an activity that

requires controlled physical movement to be made under the guidance of the mind, which receives its stimulus through sensory input. The ability of an individual to perform specific task on its own successfully is skill. According to Obi (2011), a person is said to have acquired a skill when he can finish a given piece of work at a given time with minimum errors. To attain this level of minimum error, the individual needs to acquire basic training or knowledge relating to the assignment or task to be performed whether through formal training or a combination of both (Formal and informal training).

Skill is a learned capacity or talent to carry out predetermined work often with the minimum outlay of time, energy or both (open encyclopedia 2019), Skill usually requires certain environmental stimuli and situation to assess the level of skill being shown and used. Office Technology and Management graduates need a broad range of skills in order to contribute to a modern economy and take their place in the technological society of the century (Igbodo, Ezoem, Ikejiofor, Nwalado and Ayemhenre, 2013). It has been observed that the workplace is changing, and so are the skills that Office Technology and Management graduates must have to be able to cope with such changes with it. In summary therefore, skill is an acquired attitude, abilities and behaviours exhibited after an exposure to theories and practices in the individual's field of study. Importance of Acquiring OTME Skills in Nigeria

Maximum skills acquisition helps OTME students to be engaged in productive work either for themselves or for the employers of labour. According to Okorie and Ezeji in Udo (2014) the acquisition of requisite skills is a means of increasing the productive power of any nation. They also added that Nigerian society should recognize the fact that every citizen should be well equipped to contribute effectively to the welfare of the country. The acquisition of such practical skills is important because when efficient and skillful hands are employed in any fields of human endeavours, high productivity is usually achieved.

The acquisition of OTME skills is a veritable tool for national and manpower development. According to Peter (2010) office education graduates is expected to be competent in performing basic skills. He further remarked that employers and customers have not reduced their demand for graduates who are competent in the use of grammar, punctuation, spelling and proper word choice and who can express themselves well both orally and in writing. He highlighted that listening skills are also essential, the ability to follow directions and accurately collect fact and information to be stored and later retrieved are important skills that go far beyond what we normally thought as proofreading.

More so, maximum skills acquisition by OTME students and other will help to enrich the Nigerian

society economically and in this way tend to facilitate economic development. Okorie and Ezeji in Udo (2014) opined that a rich nation is one that is capable of meeting the economic, social, moral and political needs of the citizenry. Nigeria as a nation will enjoy economic stability if OTME students in particular and all other VE students in general acquire maximum skills in their specialties.

Furthermore, politically. OTME skills tend to promote personal and national greatness. Okorie and Ezeji in Udo (2014) pointed out that the behaviour of an individual in a society or the behaviour of a nation in a community of nations may be influenced by the skills possessed by that individual or nation. Socially, the acquisition of relevant OTME skills helps a person to provide amusement, happiness, love, affection etc. to other individuals as well as the entire nation. It also helps to reduce criminal activities such as kidnapping, armed robbery and other social vices among youths. If OTME students will give priority to the acquisition of maximum and relevant OTME skills, it is hoped that they will help alleviate poverty, promote equity, especially in relation to gender.

#### a) Skills Available for OTME Students

Skills to be acquired by OTME students are as follows:

- *Information processing skill:* Information Processing is the handling of alphabetical and alphanumeric information electronically. Kentos (2011) states that the term was coined to emphasize the manipulation of certain types of data, characters combined to form words, sentences, paragraph, memos, letters and reports. The information processing system comprises equipment procedures, and people whereby thoughts, ideas and opinions are expressed and circulated in hard copy and/or soft copy form. According to Marshall in Osamade (2017), OTME graduates possesses mastery of office skills and ability to assume responsibility, the secretary displays initiative, exercise judgment and makes decisions in today's office. The work of the OTME graduates has become more demanding and highly vast, in nature compared to what it used to be in the past. It is now necessary for office technology and management graduates to change from the use of archaic and slow manual office equipment and machine to highly sophisticated office equipment and machines which include information technology resources and interest development that will enhance the productivity and efficiency of OTME graduates work in the office.
- *Communication Skill:* Communication is the life wire of any organization, nothing in life is more important than the ability to communicate effectively. For any worker to succeed in his career, he/she must be effective in writing, speaking and listening (Nwalade,

2016). The term communication is derived from a Latin word "Communis meaning to share, to impact, to make common or to transmit. Communication is very important in every organization because most organizational process requires communication to solve problems and accomplish goals. The manner, in which OTME graduates communicate, goes a long way to affect the goodwill of the organization.

- *Human/Public Relations Skill:* Every OTME graduate is trained and exposed formally or informally to some basic human/public relations skills such as courtesy, politeness, tolerance and patience, objectivity, empathy, recognition of second party, acknowledgement and awareness, positive handling of visitors, open-mindedness, friendliness, humorous willingness to accept responsibilities, respect, etc. (Nwalado, 2016) The importance of human/public relations in any work environment cannot be ever emphasized; as such, work environment is a collection of different kinds of people who interact on daily basis. These groups of people include the employers, employee's visitors, contractors etc. How a stuff is perceived by the employers, and co-workers and even visitors to the office plays a large role as minor as your day-to-day happiness at the office and as major as the future of your career. Public/human relationship skills have to do with those unique qualities, abilities and ways of doing things that promote and enhance harmony and cooperation among human persons (Ikeke and Eke in Osamade, 2017).
- *Problem solving skill:* Problem solving skill is a vital aspect of every office worker and as such should not be neglected Problem solving is an indispensable aspect of a worker in carrying out his specific job. According to Oyedipe in Nwalado (2016), problem solving is the process of working through details of a problem to reach a solution. It may include mathematical, scientific, analytical or systematic operations and can be a standard to measure the individual's critical thinking skills. OTME students need to see problem as friends, teachers or as hurdles to scale through in order to grow, mature, become more knowledgeable and better future leaders in an organization. Oyedipe in Nwalado (2016) listed four steps in problem solving as:
  - (a) Recognize that you are confronting a problem
  - (b) Reduce the problem or reject it according to your discernment of the source of the problem and what is your establishment's principle in this particular situation.
  - (c) Respond to the problem positively and wisely using the accompanying pressures to motivate you to see the resolution of the problem.

- (d) Release the problem once you have appropriated the answers to it.

OTME students who possess this skill will use it to solve personal and organizational problems any time for the upliftment of the business.

- *Attitudinal skill:* This involves the totality of ones' personality. The totality of personality on the job would involve a complex orchestration of knowledge, psychomotor skills and attitudes towards job, employer, employees and peers (Nwalado 2016). This skill would enable OTME students to surmount problems accruing from the fact that the world exposes people to come in contact with others whose believes, language, values, methods, cultural history, methods etc. are quite different from their own. This skill is dynamic; it influences the total personality of individuals. Such as honesty, accepting responsibility, exhibiting moral integrity, showing critical and responsible attitude, adapting to situations, emotional control, recognition of appropriate authorities, care and love for others, secretfulness (confidentiality), and finishing assignment on time and so on.
- *Entrepreneurial skill:* Entrepreneurial skills are competencies on resourceful skills capable of steering an individual to be self-reliant, independent and productive in meeting life's challenges (Kalikwu 2019). According to Izungha in Kalikwu (2019) entrepreneurial skills are survival skills which an individual needs to function effectively and face challenges of life, OTME students are equipped with relevant entrepreneurial skills that will enable them start up or establish their own small scale enterprises or business.

#### b) *Issues and Challenges in the Acquisition of Office Technology and Management skills*

The following are current issues and challenges in the acquisition of Office Technology and Management skills in Federal College of Education (Technical), Asaba:

- *Unstable power supply:* Irregular supply of electricity to operate computer devices such as laptops, desktops, photocopying machine, printers, scanners, laminating machines etc. appears to be one of the greatest problems militating against the acquisition of OTME skills. Virtually, all the computer devices depend on electronic power to function. Electricity instability has been a major setback for the acquisition of OTME skills.
- *Inadequate funding:* Njoku (2015) observed that the absence of proper funding does not only hamper implementation of OTME programme but also affects the quality of students produced, the operational mode of the institutions, attitude of teachers and infrastructural development of the

institutions. In Nigeria, education is completely underfunded. Government investment for OTME growth is wholly low, as can be observed by the ratio of students per computer (Ezeugbor and Nwachukwu in Egenti 2020). The Nigeria economy is poor and helpless to finance the complete acquisition of OTME skills in our colleges of education. The poor state of the economy has adversely affected the educational growth and development of the country (Nwalado and Ikenokwalu, 2019). Thus, inadequate fund or finance is a major challenge to the acquisition of OTME skills because it takes money to maintain these facilities (Nwadiokwu, 2019).

- *Poor Internet Connectivity:* This has negatively affected both teachers and students from using e-learning facilities in effective teaching and learning OTME skills in our colleges of education. According to Nwakwudo, Oguejiofor and Nwankwo in Nwalado and Ikenokwalu, (2019), e-learning provides students and teachers with practical and functional knowledge of computer, internet and other associated areas. Moreover, internet facilities should be made available 24 hours to teachers and OTME students in order to prepare them to meet up with the current information era.
- *Inadequate Facilities and Equipment:* Our schools and colleges lack the necessary facilities and equipment needed for the effective teaching and learning of OTME skills and competencies (Udo, 2014). For example, there are inadequate numbers of manual and electric typewriters, computers, printers etc. for teaching-learning of ICT in OTME departments in Federal college of Education (Technical), Asaba.
- *Poor Maintenance Culture:* The government in power does not release money for yearly maintenance of facilities and equipment. In fact, most of our schools and colleges are worse than piggery farms in abroad. According to Udo (2014), we have many dishonest students and leaders who are all out to steal and destroy whatever the government has made available in our schools and colleges.
- *Remuneration:* Lack of proper motivation of OTME lecturers discourages them from carrying out their duties and responsibilities adequately. So many of them abandon their jobs or neglect their duties sourcing for other businesses outside the school that will yield them more money.
- *Poor Attitudes of OTME Students:* Poor attitudes of OTME students towards the acquisition of the skills and competencies inherent in OTME courses make them loose personal interest and willingness to concentrate and acquire maximum level of skills

expected of them. One of such negative attitudes is failure to sit down and make wise use of their time and energy in acquiring maximum relevant skills for self-development and fulfillment (Udo, 2014). More so, OTME students fail to find time to engage themselves in practical exercises in courses such as typewriting, word processing and shorthand to mention just a few. When assignments are given in any of the courses listed above, it is often discovered that about eighty (80) percent of OTME students in the class did not find time/ot take time to do it. Udo (2014) asserts that students fail to take their studies seriously as they often come late to class and even when they know they are terribly late, yet they would be listening to pop music/other music or talking to people with their phones.

- *Low level of computer literacy among OTME teachers:* Lack of OTME teachers with the right knowledge of computer usage is one big barrier militating against the effective acquisition of OTME skills (Nwalado and Ikenokwalu, 2019). Another issue is the computer literacy skills of both the teacher and the learner (Harper, Hedburg, Bernnet and Lockyer in Nwalado and Ikenokwalu, 2019). Teachers need the skills for preparing course materials and learners equally need it for the comprehensive learning process. Unfortunately, most OTME teachers in Nigerian colleges of education lack the confidence to make effective use of computer facilities in and outside the lecture room.
- *Unwillingness of OTME students to change their thinking and behavior positively:* It is common place that one hundred (100) percent of OTME students' success in life or in their studies is dependent on positive attitudes to whatever they are taught (Udo, 2014). He also asserts that, the willingness of OTME students to change positively their attitudes and behaviours could help them to acquire maximum effective and relevant skills expected of them for the labour market. Unfortunately, many OTME students are often unwilling to change their negative attitudes. In fact a majority of business students in our schools and colleges are often unwilling to concentrate and study the skills content of OTME courses to maximum level. For example, in teaching and learning of typewriting many students only want to operate the typewriter or computer keyboards with two or three fingers instead of nine fingers.

#### IV. CONCLUSION

The Office Technology and Management programme is a career training or education to ensure that an individual is career ready with the right skills and attitudes needed for transition from school to work or for advancement in the OTME career path. Office



Technology and management inadvertently is a major skilled area which is highly inclined to assist in achieving the demands of modern workplace and creating self-employment. Unfortunately, there are numerous issues and challenges facing the acquisition of OTME skills in institutions of higher learning in Nigeria. From the above analysis, it is obvious that no meaningful OTME skills can be acquired in colleges of education without adequate provision of facilities, manpower and equipment needed in OTME departments to meet the changing needs of the society and workplace.

## V. RECOMMENDATIONS

The following recommendations become imperative if OTME skills must be acquired:

1. Government and stakeholders should ensure there is regular power supply in institutions of higher learning where OTME courses are being offered and also the management of institutions can improvise for power supply to avoid interruption during teaching learning Process.
2. Funding should be adequate and regular. Government and stakeholders in education should make adequate provision for the educational institutions NCCE and TETFUND should constantly disburse funds needed for appropriate implementation OTME programme in Colleges of Education to enable them meet the current state of art in education
3. The school management should provide alternate source of internet connection should the school's server be lone to enable smooth teaching and learning.
4. Government should provide adequate facilities and equipment needed for the acquisition. Of OTME skills.
5. Lecturers and students who make use of these equipment and facilities used for skill acquisition should ensure that these facilities are properly cared for after usage and there should be constant maintenance and response whenever there is breakdown in the usage of any of these facilities or equipment.
6. OTME teachers should be adequately motivated to enable them put in their best in discharging their duties and responsibilities.
7. There should be constant training and retraining of lecturers on new technologies introduced into the OTME programme.
8. There should be massive awareness campaign on the benefits of studying OTME so that the negative attitude of students towards skill acquisition will be reduced or eliminated.

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## A Study of Different Modes' Synergy from the Perspective of Multimodal Discourse: Taking Apple Product Launch Conferences as an Example

By Liu Sijiao & Professor Tian Jianguo

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**Abstract-** With the development of science and technology and media information, great changes have taken place in communication methods. Images, music, gestures or written language all play important roles in daily communication besides of spoken language. This study selects Apple Event 2018 as the research subject based on Halliday's Systemic Functional Linguistics Framework and Zhang Delu's modal synergy theory to analyze the selection, combination, relationship and multimodal application of modes in product launch conference in order to realize the interpersonal functional meaning of Halliday's Metafunction Theory under the coordination of multiple modes.

The results show that the visual and auditory modes are the main means cooperating with each other to express the speakers' meaning. Besides, this cooperation is not arbitrary, but follows the interaction of complementary and non-complementary relations; At the same time, according to the classification of complementary and non-complementary relations, the modality can promote the acceptability and enthusiasm of the discourse, thus encouraging the audience to have the desire to consume.

**Keywords:** *interpersonal function, modes, multimodal discourse analysis (MDA), product launch conference.*

**GJHSS-G Classification:** LCC: P91.3



*Strictly as per the compliance and regulations of:*



# A Study of Different Modes' Synergy from the Perspective of Multimodal Discourse: Taking Apple Product Launch Conferences as an Example

Liu Sijiao <sup>α</sup> & Professor Tian Jianguo <sup>σ</sup>

**Abstract-** With the development of science and technology and media information, great changes have taken place in communication methods. Images, music, gestures or written language all play important roles in daily communication besides of spoken language. This study selects Apple Event 2018 as the research subject based on Halliday's Systemic Functional Linguistics Framework and Zhang Delu's modal synergy theory to analyze the selection, combination, relationship and multimodal application of modes in product launch conference in order to realize the interpersonal functional meaning of Halliday's Metafunction Theory under the coordination of multiple modes.

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Through the analysis of multimodal discourse and from the perspective of interpersonal function, this study provides some enlightenment for entrepreneurs to understand how multimodal discourse is accepted and understood by the audience.

**Keywords:** *interpersonal function, modes, multimodal discourse analysis (MDA), product launch conference.*

## I. INTRODUCTION

In recent years, more and more scholars at home and abroad devote themselves to multimodal discourse analysis (MDA). Chinese as well as foreign scholars study multimodal discourse involving many language categories and topics. Kress & Van Leeuwen and O'Toole extended the concept of meta-function to images and proposed the conceptual and theoretical framework of visual grammar. On this basis, Royce, O'Halloran and Martinec analyzed and explained the specific text of visual and auditory multimodal. Since the 1990s, more and more domestic linguists have paid attention to the study of multimodal discourses in different genres, including advertisements, poems, films and new media. However, there are few multimodal discourses involved in product launch. Apple's product launches, in particular, are the focus of mass media's attention. In order to achieve better results, product launches are

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often elaborately designed and make full use of various modes and media such as language, voice, gesture and video at the same time. These different modes interact with each other to vividly express the meaning of design from the company and the designers.

Based on Systemic Functional Linguistics, this paper attempts to study the synergy of dynamic multimodal discourse modes in Apple's product launches. Theoretically, firstly, the research of product launch from multimodal perspective provides a new method to conduct the research of enterprise launch conference. Second, it draws the application of systematic functional grammar to the multimodal discourse analysis of production promotion release conference. Practically, through the analysis of multimodal discourse in product launch events, this study provides some enlightenment for sellers to understand how multimodal discourse can be accepted and understood by the audience, so as to give full play to the positive impact of product launch events and help merchants to capture the different tastes of the audience.

The remainder of the paper is structured as follows. Section 2 reviews multimodal discourse analysis and product launch conferences at home and abroad. The methodology and findings of the study are presented in Section 3 and 4 respectively. Finally, Section 5 concludes the study.

## II. LITERATURE REVIEW

### a) Previous Studies of Multimodality Discourse Analysis

#### i. Previous Studies of Multimodality Discourse Analysis Abroad

After more than 20 years, a large number of research achievements have been made. The mainstream foreign perspectives on multimodal discourse analysis include: social semiotics multimodal discourse analysis, system-functional multimodal discourse analysis (SF-MDA), multimodal interaction analysis, and multimodal corpus analysis. As for the multimodal study of social semiotics, Saussure believes that symbols have social characteristics. Halliday (1978) believed that language is a kind of social symbol. Social semioticians believe that the choice of symbol resources is determined by the intention of the symbol interpreter, which means that the choice of symbols determines the

expression of meaning, and the various modes have diversified potential meanings at the same time.

Systemic functional multimodal discourse analysis is also derived from Halliday's Systemic Functional Grammar, which is the core framework of the analysis method. Unlike the approach of social symbolic marking (top down), the contextual approach and specific ideological orientation, the SF-MDA is from the bottom to up. Related research includes a range of other multimodal texts, for instance, hypermedia (Djonov, 2007), television discourse (Bednarek and Martin, 2010), online newspaper (Knox, 2013), and language and gestures for teaching (Fei Victor Lim, 2019).

Multimodal interactive analysis is developed on the basis of media discourse analysis and absorbs some ideas from social semiotics. It focuses on how interactors use multiple symbol patterns to realize social activities and emphasizes the prominence of identity in interaction (Norris, 2004; Norris & Jones, 2005; Ron Scollon, 2001; Ron Scollon & Suzanne Wong Scollon, 2003).

Corpus analysis, systemic functional linguistics and semiotics consist of the multimodal corpus analysis to verify the hypothesis of meaning generation in multimodal discourse research. Bateman (2014), on behalf of this school, believes that it is very important to pay attention to how to analyze cases in the early development of multimodal research theory. Currently, the most frequently used multimodal database tools are Anvil, Elan, etc. However, the annotation of multimodal discourse is time-consuming and laborious, which leads to the inadequate multimodal research based on the large corpora.

#### ii. *Previous Studies of Multimodality Discourse Analysis at Home*

In China, multimodal discourse analysis started from Social Semiotics Analysis of Multimodal Discourse (Li, 2003), which elaborated the visual grammar specifically. Following research is mainly focused on the three aspects: first, as for the research on multimodal discourse analysis based on SFL and social semiotics, a large number of scholars have devoted themselves into applying other relevant theories to the case studies. For example, Zhang and Mu (2012) discussed the construction of multimodal functional stylistics theoretical framework through the analysis of graphics and articles on the basis of functional stylistics theoretical research. Feng, Zhang and Wang (2016) used the theory of rhetorical structure to the study of advertising.

There are few studies on multimodal interaction analysis in China. Zhang and Wang (2016) comprehensively introduced the basic theory and method of this analysis, and discussed the characteristics and deficiencies of this method. They propose a comprehensive framework of multimodal

interaction analysis and analyze the teaching activities in English classroom.

Multimodal corpus analysis is still not common in China. Wang and Zhang (2016) found that the existing research methods of SFL cannot be directly applied to the description of multimodal genre features which needs more improvement. Hu and Liu's (2015) analysis of the construction of the multimodal corpus both at home and abroad, which found out that the present research situation and focus more on modal interpretation corpus, especially from the aspects of effective collection, quality requirements, the multi-level annotation model the non-language factors (including the phenomenon of language expression and gestures), shaft alignment in time, and the perspectives of the reliability evaluation of the label.

#### b) *Previous Studies of Product Launch Conference*

##### i. *Previous Studies of Product Launch Conference Abroad*

Most researches on product launches focus on how to make effective and engaging presentations. Lucas, whose masterpiece *The Art of Public Speaking* is known as the "bible of Public Speaking", explained how a good speech should be prepared in terms of topic selection, understanding of the audience and collection materials. *The Art of Lecturing*, written by Parham Aarabi, offers a practical recommendation for effective university lectures and business presentations. In *iKeynote-Representation, Rhetoric and Visual Communication by Steve Jobs In His Keynote at Macworld 2007*, Kast (2008) elaborated how Steve Jobs interacted with resources and various modes through rhetorical devices, and delivered persuasive messages. Product launch is playing an increasingly important role in today's business environment.

##### ii. *Previous Studies of Product Launch Conference at Home*

At the same time, there are also some domestic research on product display. Cai and Zhou (2007) expounded the importance of speech in international business, classified it according to the purpose of product launch, and gave relevant suggestions for effective presentation. Liu (2013) conducted a further investigation of the successful speech strategy of Steve Jobs at apple, which is that in a brief introduction to the business after the classification and structure of the speech, the author discussed the features of language Steve Jobs used, and also talked about his effective skills before and in the process of the demonstration. Gao and Zhang (2015) pointed out the significant meaning of mobile phone product launch. This paper puts forward three suggestions for holding the product launch conference. The authors found that product launches can help companies become competitive, capture the taste of consumers, and be able to prone the potential market among rivals.



### III. METHODOLOGY

#### a) Theoretical Framework

Systematic Functional Linguistic (SFL) is one of the most prevalent linguistic schools around the world. It was first proposed by British linguistic J.R. Firth and the further developed by Halliday, M.A.K (1985). In this

study, the content level which includes the meaning level and form level will be applied. In the discourse meaning, the interpersonal meaning in the product launch conference will primarily be dug out, and as for the form level, the paper will try to figure out all the forms existing in the conference as well as their relationships.

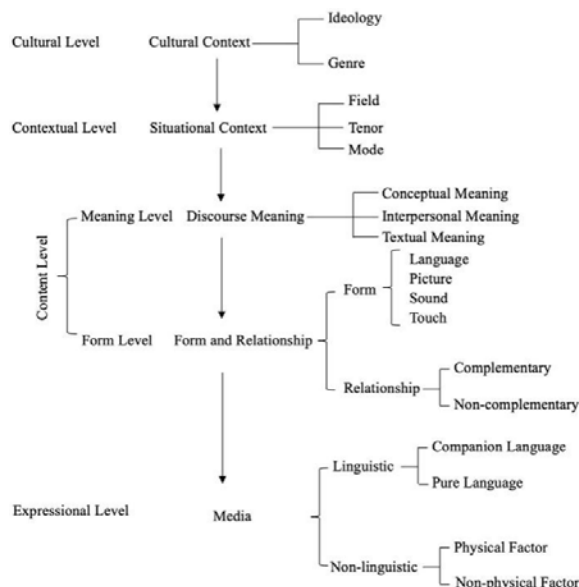


Figure 3.1: Synthetic Theoretical Framework of Multimodal Discourse Analysis (Zhang, 2009a: 28)

In 2009, Zhang Delu proposed the intermodal relationship in his article *An Exploration of the Synthetic Theoretical Framework of Multimodal Discourse Analysis* which expounds the concepts and detailed examples of intermodal relationship. The multimodal discourse mode

is that when one modal discourse cannot fully express its meaning, its meaning needs to be added by another one. The relationship between such modes is called "complementary relationship", while the others are called "non-complementary relationship".

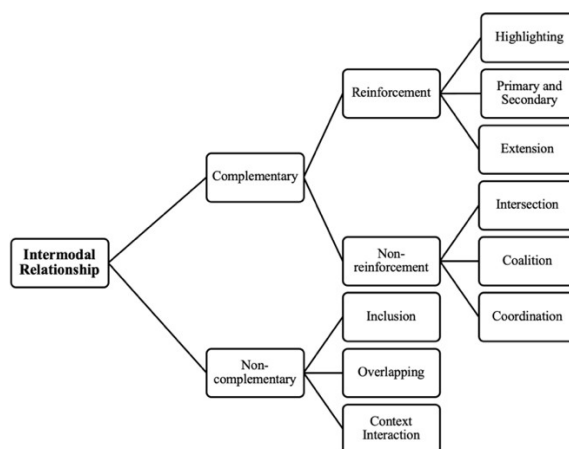


Figure 3.2: Zhang Delu's Inter-Modal Modes and Relationship (Zhang Delu, 2009)

#### b) Research Question

According to the systematic functional framework and Zhang Delu's intermodal relationship combining with concept of Halliday's interpersonal meaning, this paper aims to design a dynamic multimodal discourse analysis framework for Apple Product Launch Conference to figure out the following specific questions:

- (1) What are the characteristics of the modal forms and combinations of different modes in Apple's product launch?
- (2) What is the specific relationship between different modal forms?
- (3) How do different modes realize interpersonal meaning in multimodal discourse?

### c) Research Procedure

The study starts with figuring out the different modes in Apple Event 2018, then according to Zhang Delu's definition of the intermodal relationship between different modes, identify and determine the relationship between different modes of the launch part of iPhone in

the product release conference of Apple. Besides, based on the first two stages, how different models interact and cooperate with each other to generate interpersonal meaning during period of the Apple's product launch conference will be further discussed.

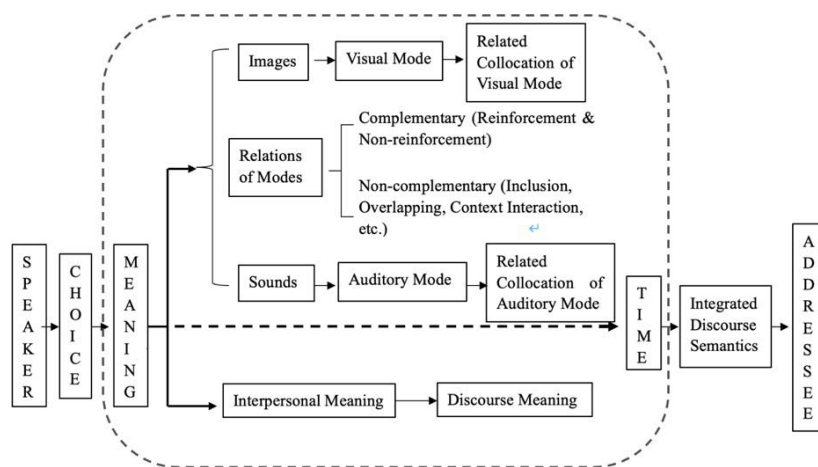


Figure 3.3: Synthetic Theoretical Framework for Multimodal Discourse Analysis

### d) Data Collection and Analysis

The corpus was selected from the 2018 Apple product launch event once a year in autumn, and the selected new product launch event was obtained from the Apple official from YouTube. At the same time, the computer screenshot function was employed to capture videos and pictures containing multi-modes, and Xunfei

listening software was used to convert video track into text, which constituted the corpus of this study.

The corpus selected in this paper is a dynamic multimodal corpus of about one hour and five minutes long (37'02"—1h 41'55") from Apple's press conference on September 13, 2018, which includes audio, video and spoken demonstration.

## IV. RESULTS AND DISCUSSION

### a) Distribution of Different Modes in Apple Product Launch Conference 2018

The following table is the data collected through the corpus.

Table 4.1: Frequency of Different Mode

Mode	Frequency
Oral Presentation	540
Music	5
Pictures	221
Animations	16
Texts	67

In the Product Launch Conference, the interaction and cooperation of the visual modes and the auditory modes are important and indispensable. In the whole process, the oral presentation is in the dominant place, which is the primary sector and mode in terms of quantity and quality. Besides, there are a few music to support the effect of the auditory modes. The visual modes mainly have their impact on the conference through the means of texts, pictures and videos. And the visual modes have two effects to auditory modes: first, they point out the essential part of the conference to make the key information more explicit; second, they

complement the auditory modes to make up some absent and ambiguous information to the audience.

### b) Different Modes' Relations in Apple Product Launch Conference

#### i. Combination of Different Modes in Apple Product Launch Conference

In this corpus, there are text, pictures and video (animation) belonging to the visual mode, as well as music and oral presentation belonging to the auditory mode. Therefore, there would be 21 types of combinations of these five mediums.

Table 4.2: Frequency of Different Combination

<i>Combination</i>	<i>Frequency</i>
Text + Oral Presentation	81
Picture + Oral Presentation	179
Animation + Oral Presentation	48
Text + Music	0
Picture + Music	0
Animation + Music	2
Text + Oral Presentation + Picture	191
Text + Oral Presentation + Animation	5
Oral Presentation + Picture + Animation	0
Text + Music + Picture	0
Music + Text + Animation	0
Music + Picture + Animation	0
Oral Presentation + Music + Text	0
Oral Presentation + Music + Animation	27
Oral Presentation + Music+ Picture	0
Oral Presentation + Music + Text + Picture	0
Oral Presentation + Music + Text + Animation	1
Oral Presentation + Music + Picture + Animation	0
Oral Presentation + Picture + Text + Animation	0
Music + Picture + Text + Animation	0
Music + Picture + Text + Animation + Oral Presentation	0

In this study, there are only eight collocations at the Apple event, and they are listed in the table 4.2. It can be found that at the site of Apple's press conference, oral presentation is the main auditory mode media, so there are many collocations with it, which are five groups of collocations. And it can be found that the company in order to create a typical product texture, every time the animations appear with oral presentation or music.

In general, in order to ensure the clarity and simplicity of the message, it is rare to use multiple media at the same time. As can be seen from the results, the combination of two media is the most common collocation, which is 211 times in total. The three media were matched for 25 times, and the four media were matched for 1 time, while the five media did not appear together at the same time during the whole conference.

#### ii. *Different Combination in Complementary Relation*

In order to figure out the similarities and differences among different frequency of the multimodal relations and the synergies between the auditory mode and visual mode in Apple Product Launch Conference, the figures are concluded as follows.

#### 1. Reinforced Relation

In the reinforced relationship, one mode acts as the major channel of communication, while other modes

play merely the complementary role. In the following part, the most commonly used two relations will be illustrated further with examples.

Table 4.3: Frequency of Different Combination in Complementary Relationship

<i>Relationship</i>	<i>Combination</i>	<i>Frequency</i>
Highlighting	Text + Oral Presentation	60
	Picture + Oral Presentation	33
	Animation + Oral Presentation	14
	Text + Oral Presentation + Picture	48
Primary and Secondary	Picture + Oral Presentation	68
	Animation + Oral Presentation	10
	Text + Oral Presentation + Picture	119
	Text + Oral Presentation + Animation	5
Extension	Text + Oral Presentation	7
	Picture + Oral Presentation	4
	Text + Oral Presentation + Picture	2
Intersection	None	None
Coalition	Oral Presentation + Music + Animation	19
	Oral Presentation + Music + Text + Animation	1
Coordination	Text + Oral Presentation	1
	Picture + Oral Presentation	64
	Animation + Oral Presentation	24
	Animation + Music	2
	Text + Oral Presentation + Picture	12
	Oral Presentation + Music + Animation	1

#### (1) *Highlighting Relation*

The highlighting relationship appears 155 times in total, and the main purpose of this kind of relationship is to provide the background in order to make the speakers' information emphasized. As we can see from the table 4.3, there are 60 times belonging to the combination of Oral presentation and Text. In this situation, the texts mainly serve as the background information to emphasize the theme or the section of the conference to tell the audience what will be introduced in the part. For instance,

(1) *Now let's talk about iPhone.*



This is the first sentence in the whole introduction part of new iPhone. And the text "iPhone" appeared in the background board, whose aim is to inform the audience that we are going to enter the introduction part of iPhone and to emphasize what the speaker's intention to attract the attention from the audience.

#### (2) *Primary and Secondary Relation*

The primary and secondary relationship is the main modes of supplementing the meaning during the conference, which has 202 times in total. From the table 4.3, we can make a conclusion that the combination of Oral presentation, Picture and Text gets the most frequency in primary and secondary relationship, which is almost twice as the second higher combination of Oral presentation and Picture. For instance,

(18) *It's an OLED display, 5.8 inches on the diagonal, and it's 2.7million pixels, 458 pixels per inch, the highest quality display on an iOS device.*



From this example, it can be seen that if one watches the picture only without the sound assistance, what the picture intends to communicate can barely be understood. Unless the audience heard what the speaker supplemented the material that the new iPhone XS made of or the text on the screen. The auditory mode will fail to play its function without the support of the picture. The *It* in this sentence can hardly be understood what it refers to so as to need the help of the picture to show its subject. Therefore, it can be concluded that the auditory mode serves as the primary means and the visual mode secondary, whose function is to complement and reinforce the auditory mode.

## 2. Non-reinforced Relation

The non-reinforced relationship can be defined as that neither of the two modes can be omitted and they interact with each other closely. There is no appearance of the intersection relationship during the conference, 20 coalition relationship in the conference, and The coordination relationship which has been used for 105 times in Apple Event 2018.

The coordination relationship contains diverse modes to conduct the complete meaning in the discourse.

### iii. Different Combination in Non-Complementary Relation

*Table 4.4:* Frequency of Different Combination in Non-complementary Relationship

<i><b>Relationship</b></i>	<i><b>Combination</b></i>	<i><b>Frequency</b></i>
Inclusion	Picture + Oral Presentation	6
	Text + Oral Presentation	13
	Picture + Oral Presentation	4
	Text + Oral Presentation + Picture	10
Context Interaction	Oral Presentation + Music + Animation	7

The table 4.4 indicated the frequency of different combination in non-complementary relationship in Apple Event 2018. The non-complementary relation refers to a relationship in which the second mode does not have contribution to the entire meaning. And the non-complementary relationship can be further divided into three kinds: inclusion, overlapping and context interaction relationships.

For instance,

(485) *It's a 12 megapixel, wide angle camera, the exact same wide-angle camera in the XS and XS Max, so it's our new generation sensor that's larger with bigger pixels, optical image stabilization, twice as many focus pixels, faster f1.8 aperture, Apple design lens and the new improved true tone flash as well.*



In this example, there are two modes here, the visual mode and the auditory mode, and the main mode is the auditory mode as the meaning is primarily expressed by the speaker. However, the audience is exposed to too many technical jargons, which are obscure for layman even in written form, let alone in auditory form. Therefore, the oral presentation in this section can not convey the meaning alone, and these technical jargons are well illustrated by the picture and texts showed on the screen. Neither of the two modes can convey the complete meaning on its own term.



From table 4.4, it can be concluded that there are 27 times appearing in the conference and 13 times for the combination of Oral presentation and Text. The speakers were likely to say something unrelated to the topic during the transition phase like the greeting words, which is mainly led by the text. The speakers were also willing to emphasize the content by putting words on the screen while telling the audience exactly the same words. Therefore, it is normal to see that the frequency of the combination of Oral presentation and Text is the highest in the overlapping relationship.

### c) Analysis of the Interpersonal Metafunction

According to Halliday's systematic functional grammar, modality plays an important role in explaining the relationship among speakers. No matter it is verbal or nonverbal, it has an influence on the interpersonal relationship. Due to the limited time and experience, the study mainly selected the modality "can" as the subject to dig out the interpersonal meaning in the Apple Event 2018.

As for the interpersonal metafunction in complementary relationship, the modal operator *can* appears 57 times in the complementary relationship, including highlighting relationship 10 times, primary and secondary relationship 25 times and coordination relationship 22 times. It can be noticed that the modal operator most exists in primary and secondary relationship, which functions as the main approach of explanation during the product launch conference. It means that the speakers are clinging to use reinforcement relationship to conduct a positive meaning for the audience.

As for the interpersonal metafunction in non-complementary relationship, the modal operator *can't* appears four times in the non-complementary relationship, which all belong to the type of overlapping relationship. The non-complementary relationship means that the only one mode has already expressed the whole meaning and there is no need for other modes to supplement. The use of modal operator can help to express positive information to the audience, while some low modal operator with high politeness in overlapping relationship conduct less meaning during the conference.

## V. CONCLUSION

It is clear that the Apple Event has applied rich semiotic resources which can be represented by multimodal features mainly including visual and auditory modes. Through the detailed analysis, the oral presentation by speakers is the main media during the conference, which means that the auditory mode serves as the primary mode to construct the meaning to the audience. And the visual modes are complementary to the auditory modes. It is a complementary relation between the visual and auditory modes in the most

occasions, especially the non-reinforcement relation. Based on the interpersonal function, it is apparent that the low modal operator *can* has the high inclination to the complementary relationship, which plays an important role in constructing the positive attitude and evaluation of the speakers. With little Question and no Command, the application of modal operator indicates that the discourse is of high politeness.

In a word, every mode has its place in expressing and conveying meaning, whose various collocation and interaction makes the whole Event successfully held. And the use of the low modal operator establishes a closer relationship between the speaker and the audience and try to persuade and encourage the audience to cultivate the sense of purchase.

One of the limitations of this study is that the paper only employed the iPhone Launch part as its corpus. And it is not enough to find out the exact distribution rules of the synergies between the auditory and visual modes, which may be not persuasive and evident to some extent, also the entire study of SFL has not been conducted due to limited knowledge and experience. Further research must conduct larger-scale studies to ensure the objectivity of the study. In addition, in this study, only the auditory and visual modes are analyzed, much more comprehensive studies can be carried out to analyze the other modes whose collocation as well as interaction should be further analyzed through technical means rather than artificial ways. Third, there are few criteria for researchers to divide the dynamic discourses, so framework of the transcribing of the dynamic multimodal discourse should be further studied.

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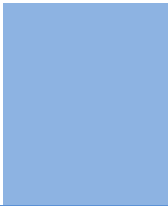
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A major lynchpin of research work for the writing of research papers is the keyword search, which one will employ to find both library and internet resources. Up to eleven keywords or very brief phrases have to be given to help data retrieval, mining,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

## 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.



### *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.



**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

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BY GLOBAL JOURNALS

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Topics	Grades		
	A-B	C-D	E-F
<b>Abstract</b>	Clear and concise with appropriate content, Correct format. 200 words or below	Unclear summary and no specific data, Incorrect form Above 200 words	No specific data with ambiguous information Above 250 words
<b>Introduction</b>	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
<b>Methods and Procedures</b>	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
<b>Result</b>	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
<b>Discussion</b>	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
<b>References</b>	Complete and correct format, well organized	Beside the point, Incomplete	Wrong format and structuring



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