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PRESENTACIÓN

Interacción y Perspectiva, Revista de Trabajo Social de la Universidad del Zulia, se presenta como una plataforma académica multidisciplinaria que reúne investigaciones rigurosas y actuales sobre fenómenos sociales complejos, abordados desde diversas perspectivas teóricas y metodológicas. Su propósito es fomentar el diálogo crítico entre disciplinas como el trabajo social, la educación, la sociología, la filosofía, los estudios de género y los derechos humanos, con especial énfasis en los procesos de transformación social, resiliencia comunitaria y justicia cognitiva.

La edición que se presenta está organizada en cinco grandes áreas temáticas que permiten una lectura estructurada y coherente de los contenidos. En primer lugar, el bloque dedicado al **Trabajo Social** incluye investigaciones que exploran la interacción entre trabajadores sociales y medios de comunicación, destacando la importancia de la transparencia informativa y la adaptación digital. También se examinan experiencias de intervención comunitaria a través de la educación física, así como los factores que influyen en la percepción de la profesión entre estudiantes de secundaria en Vietnam.

El segundo eje temático aborda la **Familia**, desde una perspectiva sociocultural y educativa. Se analizan las transformaciones en los valores familiares entre la juventud moderna, el papel de los rituales maternos en la identidad kirguís, y las percepciones de docentes y familias sobre el acoso escolar entre iguales en Chipre del Norte. Estos estudios revelan tensiones entre tradición y modernidad, y ofrecen recomendaciones para fortalecer la cohesión social desde el núcleo familiar.

En el área de **Género**, se presentan investigaciones que examinan la construcción de identidad y resiliencia en espacios institucionales dominados por hombres, el impacto del dimorfismo sexual en el procesamiento cognitivo y la adaptación social, y los dilemas éticos y sociales en torno a las decisiones sobre el embarazo. Asimismo, se incluye un análisis desde el derecho islámico sobre los motivos de la infidelidad conyugal y sus posibles soluciones, lo que aporta una mirada intercultural y normativa al debate sobre las relaciones de pareja.

El bloque más amplio corresponde al **Desarrollo Social y Capital Humano**, donde se abordan temas como los efectos de la guerra y la digitalización en Ucrania, las prácticas juveniles en entornos digitales, la ecología de saberes como alternativa epistemológica, y la cultura corporativa como factor de integración social. También se examinan fenómenos como la alienación laboral en la era digital, la formación continua de funcionarios públicos, el bienestar psicológico en estudiantes internacionales, y la educación ciudadana a través del folclore. Estos estudios convergen en la necesidad de repensar los modelos de desarrollo, inclusión y participación en contextos de alta complejidad.

En el área de **Investigación**, se destaca un análisis bibliométrico sobre el emprendimiento digital a lo largo de dos décadas, así como una propuesta metodológica para evaluar la transformación del ecosistema social en Ucrania desde una perspectiva glocal. Finalmente, el bloque de **Derechos Humanos y Sociedad** incluye reflexiones sobre los derechos digitales en la era de la globalización, la rehabilitación social de personas privadas de libertad, y los discursos políticos que han sustentado el Estado de derecho en Ucrania desde el siglo XIX.

En conjunto, los artículos que conforman esta edición de *Interacción y Perspectiva* ofrecen un panorama amplio, crítico y profundamente comprometido con los desafíos sociales del presente. La revista se consolida como un espacio de reflexión académica que promueve la construcción de saberes situados, la articulación de propuestas transformadoras y el fortalecimiento de las prácticas profesionales en contextos diversos y cambiantes.

Deseamos expresar nuestro agradecimiento a todas y todos los autores que han contribuido con sus investigaciones a esta edición. Su compromiso con el rigor académico, la innovación metodológica y la sensibilidad social en el abordaje de temas complejos ha enriquecido profundamente el contenido de la revista. Gracias por compartir sus saberes, experiencias y reflexiones, que sin duda aportan al fortalecimiento del pensamiento crítico y a la construcción de sociedades más justas, inclusivas y conscientes de su diversidad.

Raima Rujano

Editora

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ARTÍCULO DE INVESTIGACIÓN

Interacción entre trabajadores sociales y medios de comunicación: transparencia, confianza y adaptación digital

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Resumen. La comunicación entre trabajadores sociales y representantes de los medios de comunicación desempeña un papel esencial en la configuración de la opinión pública, al fomentar la transparencia informativa y fortalecer la confianza en las instituciones sociales. En el contexto actual de digitalización y expansión de las tecnologías de la información, esta interacción está atravesando transformaciones profundas que exigen un análisis riguroso de las tendencias emergentes y de los enfoques más eficaces para diseñar estrategias comunicativas. El artículo examina los modelos de comunicación social vigentes y define estrategias óptimas para mejorar la interacción entre ambos actores. La metodología se fundamenta en el análisis teórico, el método comparativo y el análisis de contenido de fuentes científicas, permitiendo identificar los desafíos actuales y evaluar los enfoques predominantes en los procesos comunicativos. Los hallazgos revelan que la eficacia de la comunicación social depende de la alfabetización mediática de los trabajadores sociales, de su capacidad para adaptar métodos tradicionales a entornos digitales, y de la implementación de estrategias sostenibles a largo plazo. Factores como el uso estratégico de redes sociales, la creación de plataformas informativas integradas y la formación especializada son clave para optimizar la calidad del vínculo con los medios. No obstante, persisten barreras como la baja confianza en los servicios sociales, las restricciones burocráticas y la tendencia a la sensacionalización mediática. La relevancia práctica del estudio radica en la formulación de recomendaciones que permitan a las instituciones sociales fortalecer sus estrategias comunicativas, promoviendo su eficiencia, transparencia y una imagen positiva del sector.

Palabras clave: comunicación social, medios de comunicación, trabajadores sociales, interacción informativa, tecnologías digitales, alfabetización mediática, confianza, estrategias de comunicación.

Social communication between social workers and media: transparency, trust, and digital adaptation

Abstract. Communication between social workers and media representatives plays a crucial role in shaping public opinion by promoting informational transparency and strengthening trust in social institutions. In the current context of digitalization and the expansion of information technologies, this interaction is undergoing profound transformations that require a thorough analysis of emerging trends and the most effective approaches for designing communication strategies. This article examines prevailing models of social communication and defines optimal strategies to enhance interaction between these two actors. The methodology is based on theoretical analysis, comparative methods, and content analysis of scientific sources, allowing for the identification of current challenges and the evaluation of dominant approaches in communication processes. Findings reveal that the effectiveness of social communication depends on the media literacy of social workers, their ability to adapt traditional methods to digital environments, and the implementation of long-term sustainable strategies. Key factors for improving the quality of engagement with the media include the strategic use of social networks, the creation of integrated information platforms, and specialized training programs. However, several barriers persist, such as low public trust in social services, bureaucratic constraints, and the media's tendency toward sensationalism. The practical relevance of the study lies in the development of recommendations for social institutions to strengthen their communication strategies, thereby enhancing their efficiency, ensuring transparency, and fostering a positive image of the social sector.

Keywords: social communication, mass media, social workers, information interaction, digital technologies, media literacy, trust, communication strategies.

INTRODUCTION

In today's society, social communication plays a key role in shaping public opinion, disseminating socially relevant information, and ensuring effective interaction between social institutions, the public, and the media. Social workers who are faced with the issues of supporting vulnerable groups of the population, social policy and integration of citizens into public life on a daily basis are forced to actively cooperate with journalists and media organizations. At the same time, this interaction is accompanied by a number of challenges, including a lack of trust between the parties, the risk of distortion of information, bureaucratic restrictions, and difficulties in creating a stable information environment. A significant contribution to the study of social communication was made by authors who studied it as a phenomenon of mass and interpersonal interaction (Savchuk, 2024; Bilan, 2016). Particular attention was paid to the study of mechanisms of information exchange between government agencies and the media, as well as issues of trust in social services (Beletska, 2018; Kostieva, 2021). At the same time, the digitalization of the communication space has changed the traditional methods

of interaction, which have been studied in works on the use of social networks and online platforms in social communication (Ben Romdhane et al., 2024; Siricharoen, 2023). Researchers also focus on the problems of disinformation and manipulative media influence, which affects the formation of public discourse and the effectiveness of social policy (Williams & Ceci, 2023; Hutchinson et al., 2024). Despite a significant number of scientific papers, questions remain about identifying effective models of communication between social workers and journalists in the modern information space. Aspects of adapting traditional communication methods to the latest digital technologies, as well as the impact of the level of media literacy of social workers on the effectiveness of interaction with the media remain insufficiently studied.

The purpose of this study is to analyze the main communication models used in the social sphere and to determine the optimal strategies for interaction between social workers and media representatives. To achieve this goal, the following tasks have been set:

- to characterize the main approaches to social communication in the context of modern information processes;
- to analyze the barriers and challenges that arise in the process of communication between social services and journalists;
- to study the impact of digital technologies on the formation of communication strategies in the social sphere;
- to identify prospects for the development of effective interaction between social institutions and the media.

These research findings can be used to develop communication strategies for social services that will increase public trust in the social sector, promote transparency of social processes, and increase the level of information exchange between the main actors of social interaction.

LITERATURE REVIEW

Currently, research in the field of social communication emphasizes the importance of its role in shaping public opinion, increasing the interaction of social institutions with the media (Savchuk, 2024; Bilan, 2016; Beletska, 2018) or creating favorable conditions for shaping public opinion and assessing the significance of various events in the information and communication policy of Ukraine and the European Union (Dobrokhotova, 2021). The introduction of digital technologies, used as a leading means of modern communication, as a basis for the rapid dissemination of socially important information, is particularly expedient (Ben Romdhane et al., 2024, Siricharoen, 2023). Effective interaction of social workers with media representatives helps to increase the transparency of social services and trust (Hohenstein et al., 2023; Kostiiieva, 2021). At the same time, it pays considerable attention to the harm caused by the spread of misinformation, sensationalized and false news, and the commercialization of content in the media (Williams & Ceci, 2023; Hutchinson et al., 2024). The quality and accuracy of social communication depend on these factors and are influenced by the high media literacy of social workers (Beletska, 2018; Moiseeva, 2015).

Within the framework of publication analysis, we see value in implementing hybrid communication strategies, using conventional and digital forums together (Livingston, 2015; Nguyen Phuc et al., 2024). Social media offer enormous opportunities for reaching the public and accelerating information (Gross & Lunardo, 2024; Gualtieri, 2021), but also significant risks of manipulating public opinion. To this end, the effectiveness of communication is determined by the consistency of messages and the transparency of the information policy of social services (Merolla et al., 2024, Yahodzinskyi, 2023). In addition to digital technologies, other authors highlight traditional forms of communication, such as press conferences and briefings, and suggest that such forms of communication allow maintaining official information discourse and controlling the accuracy of messages (Moiseeva, 2015; Zaika et al., 2021). However, these methods are less effective because the level of flexibility and speed of dissemination of their information lags behind digital platforms (Akhter & Dash, 2023; Jaster et al., 2022).

In addition to the above factors, studies have examined the function of social communication to strengthen democratic processes and support civic engagement (Ross, 2024; Priopae-Șerbănescu & Mațoi, 2023). It aims to adapt social communication to global information trends and political changes that control the work of social services (Norkus & Morkevičius, 2024; Chebanova, 2020). Analysis of international practice also shows that the success of social communication depends on the level of information literacy of the population and the availability of communication technologies (Ercegovac, 2017; Karsgaard, 2023). Considerable attention is paid to the psychological aspect of communication and its impact on the level of trust and social interaction is studied (Nguyen Phuc et al., 2024; Merolla et al., 2024). It has been established that social communication is effective in increasing social capital and supporting vulnerable groups (Zaika et al., 2021; Yahodzinskyi, 2023). Meanwhile, other researchers also argue that despite the enormous potential of communication strategies and the latest technological advances, the lack of digital infrastructure and social workers' proficiency in the latest technologies can seriously limit the potential of communication strategies (Akhter & Dash, 2023; Hohenstein, et al., 2023).

Despite the great advances in the development of social communications, the problems of maintaining the reliability of information in the digital sphere pose challenges to mitigating the impact of political fraud in social interaction. The role of artificial intelligence in shaping and regulating communication processes in the social sphere also requires in-depth study.

RESEARCH METHODS

The study uses a set of methods that provide a comprehensive analysis of social communication between social workers and media representatives. Theoretical analysis and generalization allowed to systematize approaches to defining the essence of social communication, its role and functions in modern society. A comparative analysis of different models of interaction between social workers and journalists helped to identify the features of each approach, their advantages and disadvantages. The content analysis of scientific sources helped to assess current trends in the field of social communication, in particular the impact of digital technologies and changes in the communication strategies of social services. The paper also takes into account the analysis of practical experience in implementing communication strategies in the social sphere, which allowed us to identify key challenges and prospects for the development of information interaction between social institutions and the media.

RESULTS AND DISCUSSION

Social communication is an integral element of interaction between social actors, especially in the social sphere, where information exchange determines the effectiveness of social services, shaping public opinion and building partnerships. In today's context, communication between social workers and media plays a key role in disseminating information about social issues, supporting social dialogue and ensuring transparency of social institutions.

The term "social communication" covers a wide range of information processes that take place between individuals, groups and institutions in society. It includes both interpersonal and mass communication, ensuring the exchange of knowledge, values and social norms (Savchuk, 2024). In the social sphere, effective communication determines the level of trust in social services and helps to improve the interaction between government agencies, civil society organizations and the population. Social communication in this environment includes several key elements:

- 1) Communicator (sender of information) - social workers, civil servants, representatives of public organizations.
- 2) Channel of information transmission - personal meetings, social networks, mass media.
- 3) Recipient of information - the public, media representatives, stakeholders.
- 4) The content of the message is socially significant information that influences the formation of public opinion (Bilan, 2016).

An important feature of social communication is its multichannel nature. With the development of digital technologies, traditional methods of interaction (press conferences, official statements) are gradually being supplemented by new formats, including social networks and online platforms, which allows for a more rapid response to public demands (Ben Romdhane et al., 2024).

Social communication has a number of important functions:

- The information function is to convey relevant social information to the target audience.
- Regulatory function - formation of social norms and rules of behavior.
- Adaptation function - assistance in the integration of vulnerable groups into public life (Moiseeva, 2015).
- Persuasive function - influencing public opinion on social issues (Hohenstein et al., 2023).

The media is an important intermediary between the social sector and the public, promoting social responsibility and increasing trust in social services. They perform a control function by highlighting the problems and achievements of social institutions. At the same time, the peculiarities of the modern media space, such as the spread of misinformation or commercialization of content, require greater caution in the interaction of social workers with journalists (Williams & Ceci, 2023).

PR and social communication with media representatives allows social workers to advocate for social change and influence the public agenda and policy decisions that have a direct impact on the well-being of their clients and communities. Social workers need to identify and articulate the problems, challenges, and opportunities they face in their practice and offer solutions, recommendations, or actions. For example, social workers can use campaigns, events, or petitions to mobilize and engage their audiences around a specific cause or goal, and use media relations, press releases, or articles to attract publicity and get the attention of the media or policy makers. By advocating for

social change, social workers can also strengthen their voice and influence, as well as social justice and human rights in clients and the community at large.

Social communication in the field of social work is a multidimensional process that ensures effective interaction between social workers, the media and people. It plays an important function in disseminating socially valuable information that helps to maintain trust in social institutions and shape public opinion. The development of digital technologies creates an opportunity for new channels of social communication, but it also creates new problems of managing the communication process that need to be solved.

In today’s society, effective interaction between social workers and media representatives is an important factor in shaping public opinion on social issues and policies. Cooperation between these two groups helps to raise public awareness of social services and ensures transparency of social institutions. However, such interaction is accompanied by a number of challenges, including the possibility of distortion of information, lack of competence in social communications, and difficulties in forming long-term partnerships (Savchuk, 2024). With the development of digital technologies, approaches to communication are changing, and social workers are using new strategies to establish an effective dialogue with journalists and the public. The analysis of modern approaches to interaction will help to outline key practices that promote a constructive partnership between the social sector and the media.

Based on the analysis of scientific sources and practical experience, we can identify several main approaches to interaction between social workers and media representatives:

Before considering these approaches in more detail, it is worth paying attention to the generalized characteristics of modern models of communication between social workers and journalists, as shown in Table 1.

TABLE 1. Modern approaches to interaction between the social sphere and the media.

Approach	Main characteristics	Advantages.	Disadvantages
Partnership approach	Long-term cooperation between social services and the media	Increased trust, stable information flow	Requires significant resources and time
Crisis approach	Intensification of communication in times of social crises or emergencies	Prompt response, increased public attention	Can lead to a loss of control over the narrative
Press service approach	Use of official press services to communicate with journalists	Control over the accuracy of information, official status	Limited flexibility, formality of interaction
Digital approach	Use of social media and online platforms	Rapid dissemination of information, public involvement	High probability of disinformation and manipulation
Advocacy approach	Promotion of socially important topics through the media	Raising the level of public awareness	May cause resistance from political structures

Source: created by the author based on Ben Romdhane et al. (2024), Bilan (2016), Moiseeva (2015), Savchuk (2024).

The development of effective interaction between social workers and media representatives depends on the approach and communication strategy chosen. The partnership approach is the most effective in the long run, but it requires significant resources. The crisis approach, while providing a quick response, often does not allow for control over the information space. Digital technologies open up new opportunities for communication, but at the same time increase the risk of disinformation. To optimize the interaction between the media and the social sphere, it is necessary to apply a comprehensive approach combined with traditional methods of communication and the most advanced digital technologies.

Promoting social services, social initiatives, shaping opinions and increasing social services in society is an important issue of good interaction between social workers and media journalists. However, this process is accompanied by various barriers and problems that can complicate communication. This may be due to the structural characteristics of social services and the way information is transmitted, or differences in the way information is presented. Being aware of these barriers helps to identify the right strategies to overcome obstacles and pave the way for more favorable cooperation between the two parties. Table 2 provides a general description of the main barriers and challenges.

TABLE 2. Main barriers and challenges in communication between social workers and journalists

Barrier category	Description.	Possible consequences
Lack of media literacy among social workers	Insufficient understanding of the principles of media work and the specifics of journalistic activity	Incorrect presentation of information, distortion of facts
Sensationalism and commercialization of the media	Journalists' focus on attracting attention rather than accurate coverage of events	Distortion of social issues, creation of a negative image
Bureaucratic restrictions	Long time to approve information, the need to follow protocols	Delays in the transmission of important information
Data confidentiality	Restrictions on disclosure of personal data of social services clients	Inability to present a complete picture of social problems
Low level of trust	Stereotypes and prejudices against both sides, lack of openness	Lack of productive cooperation between social workers and the media
Uneven information flow	Periodic activity in cooperation (only during crisis situations)	Lack of stable information for the society
Lack of resources	Limited funding for communication activities in the social sphere	Poor quality of media products, insufficient presence in the media

Source: created by the author based on Beletska (2018), Hohenstein et al. (2023), Kostieva (2021), Savchuk (2024).

Socially relevant information can be disseminated through the articulation of information among social workers and journalists, and should not create too many obstacles to communication. The first two main problems are the low media literacy of social workers and the media’s tendency to sensationalize, bureaucratic obstacles and data privacy restrictions. Therefore, it is necessary to develop programs to improve the communication skills of social workers, build long-term partnerships between social services and the media, and create transparency and openness in social projects.

Effective interaction with the media, and at the same time with the social sphere, is the key to social initiatives to inform about society, support vulnerable groups of the population, and strengthen trust in social services. At the same time, this communication needs to be improved due to existing barriers related to the lack of media literacy, uneven information flow, and sensationalism of the media (Savchuk, 2024).

To improve cooperation between social workers and journalists, it is necessary to use comprehensive communication methods aimed at increasing trust, transparency and mutual understanding. Below are the main methods that contribute to the effectiveness of this interaction (Table 3).

TABLE 3. Methods of improving communication between the social sphere and the media.

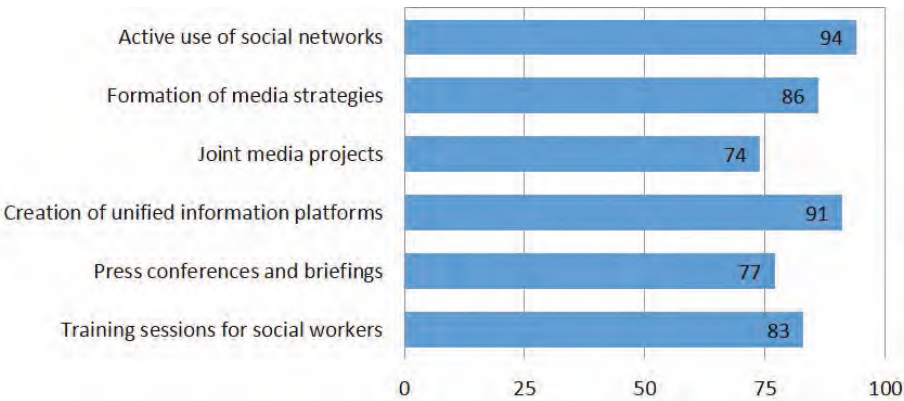
Method	Description.	Expected effect
Training sessions for social workers	Courses on the basics of media literacy and effective communication	Improved media relations skills, reduced risk of information distortion
Press conferences and briefings	Regular meetings with journalists for prompt dissemination of information	Increased openness and transparency of social services
Creation of common information platforms	Implementation of online platforms for coordination between social institutions and journalists	Faster access to verified information
Joint media projects	Collaboration with journalists on special projects and documentary materials	Increased public awareness of social issues
Formation of media strategies	Developing long-term plans for cooperation between social services and the media	Systematic coverage of social issues
Active use of social networks	Using Facebook, Twitter, Instagram to disseminate official information	Wider audience coverage, faster communication

* Created by the author.

Effective communication between social workers and media representatives is an important element of informing the public about social initiatives, promoting public dialogue, and increasing trust in social institutions. However, in order to achieve these goals, it is necessary to use modern methods of interaction that take into account the challenges of the digital age, trends in the media space, and the specifics of the social sphere (Savchuk, 2024).

The analysis of scientific research and practical recommendations allows us to identify the main methods of improving communication between social services and the media. The results are summarized in Fig. 1.

Figure 1. The level of effectiveness of methods for improving communication between the social sphere and the media.



Source: created by the author based on Beletska (2018), Bilan (2016), Moiseeva (2015), Savchuk (2024).

The analysis of the numerical data presented in the table shows a significant variation in the effectiveness of different methods of improving communication between the social sphere and the media. The highest rate of expected effect (94%) was recorded for the use of social media as a communication tool. This is due to their efficiency, wide audience reach, and interactivity, which allows social services to respond quickly to public requests, adjust information messages, and engage stakeholders in discussion (Savchuk, 2024). The second most effective measure was the creation of unified information platforms, which received 91% of the votes. Such platforms provide centralized access to official information, which is especially important in crisis situations or when implementing long-term social programs. The high level of effectiveness of this method is explained by the possibility of rapid data updates and reduced risks of misinformation (Bilan, 2016).

Somewhat lower rates, in the range of 83-86%, are observed for training sessions for social workers (83%) and the development of media strategies (86%). Training activities increase the level of media literacy of social workers, allowing them to work more effectively with journalists, but their effectiveness depends on the further practical application of the knowledge gained (Beletska, 2018). In turn, the development of long-term communication strategies avoids chaotic cooperation between social services and the media, which has a positive impact on the stability of information exchange. Joint media projects (74%) and press conferences (77%) have the lowest efficiency rates. This is due to the lengthy preparation of such events, the need for significant resources, and a certain difficulty in conveying the message to the target audience. Media projects, although they can have a long-term impact, do not always guarantee a quick response to current events. Press conferences are often perceived as a formal communication tool that does not always ensure broad interest of journalists (Moiseeva, 2015).

Thus, the results of the analysis indicate that the most effective methods are those related to digital technologies and rapid dissemination of information, while traditional methods, although still important, are less effective due to their complexity in organization and limited adaptability to rapid changes in the information environment.

Recommendations for the development of communication strategies to increase trust and information transparency in the social sphere can be summarized as follows:

- 1) Introduce media literacy training programs for social workers. Social services should organize trainings and seminars on the basics of communication, media relations and crisis management. This will help employees to interact confidently with journalists, formulate clear and convincing messages, and avoid distorting information.
- 2) Develop a unified strategy for information interaction. Social institutions should create a long-term communication strategy that will provide for systematic informing the public about social initiatives, successes and problems. This will help to reduce distrust in the social sector and ensure transparency of the institutions' activities.
- 3) Active use of digital platforms and social networks. The use of social media and online platforms allows for the rapid dissemination of accurate information and interaction with a wide audience. Regular publications, video content, and live broadcasts will help establish a dialog with citizens and increase their trust in social services.
- 4) Strengthen cooperation between social institutions and journalists. To ensure quality coverage of social issues, it is important to establish partnerships with the media through regular press conferences, briefings, and joint projects. This will help journalists receive reliable information without intermediaries and contribute to a positive image of the social sector.

DISCUSSION

The results of the study proved that communication between the social sphere and the media is an important aspect of shaping people's opinions and the tendency to trust the reality of social services. The literature analyzed shows that there are two approaches to understanding this interaction: on the one hand, some researchers argue that digital communications are important for increasing the transparency of social services (Savchuk, 2024; Bilan, 2016), while on the other hand, the emphasis is on official communication strategies and traditional media channels (Beletska, 2018; Moiseeva, 2015).

As information is widely shared through social media, it is the most effective way to disseminate information due to the speed of message transmission, wide audience reach, and interactivity, as studied by Savchuk (2024) and Bilan (2016). This is in line with the results of using digital platforms in communication strategies, i.e., using the most efficient ones. However, some authors, such as Beletska (2018), point to the risks of information manipulation in social media and loss of control over the official discourse. With regard to this point, it is necessary to maintain a balance between efficiency and transparency of information in digital and traditional media channels.

In addition, as Moiseeva (2015) notes, press conferences and official briefings are an integral part of the official information exchange in social services and journalists. This method appears to be less effective than that carried out through digital channels, which may lead to the fact that the

ways of organizing such events, for example, should include the use of digital formats, such as online broadcasts and interactive press conferences.

The issue of media literacy of social workers also remains open. According to Beletska's (2018) study, poor communication training makes effective communication with the media a challenge, and this is what the data indicates, i.e. the need for training for social workers. At the same time, some researchers (Bilan, 2016; Savchuk, 2024) argue that even with a high level of training, the problem of distrust in social services remains significant, which requires a systematic approach to the development of long-term communication strategies.

Thus, the findings are partially consistent with existing research, but also indicate the need for further research in the area of integrating traditional and digital media into the communication strategy of the social sector. An important area for future research is to evaluate the effectiveness of hybrid communication models that combine the advantages of official and digital channels. It is also worthwhile to study in more detail the impact of the level of media literacy of social workers on the quality of communication and public trust in social institutions.

CONCLUSION

The study of social communication between social workers and the media showed the need to improve information interaction to increase the level of trust and openness of social institutions. An analysis of existing approaches has shown that digital communications, including the use of social media and information platforms, are the most effective tools for the rapid and massive dissemination of socially important information. At the same time, traditional methods, such as press conferences and briefings, remain important but need to be adapted to the modern information space by integrating with digital channels. The results confirmed that one of the key challenges is the insufficient level of media literacy of social workers, which makes it difficult to interact effectively with journalists. This requires the introduction of special educational programs and trainings that will allow social services to better adapt to the information environment. It was also found that bureaucratic barriers and data privacy issues significantly limit the speed and quality of information exchange between the social sector and the media, which requires the development of clear procedures for regulating communications. The novelty of the findings lies in identifying the importance of an integrated approach to communication strategies that combines traditional and digital methods, as well as in emphasizing the need to build long-term partnerships between social institutions and the media. The practical significance of the study is that the proposed methods can be used to improve the information strategies of social services, which will contribute to the transparency and effectiveness of social policy. However, the study also has some limitations. The most important is that it does not take into account communication systems in different socio-cultural contexts and does not explain in detail the influence of political factors on the interaction between the social sphere and the media. The study also does not provide a full detailed analysis of the effectiveness of different digital platforms over time, which is an issue that still needs to be further explored.

Areas for further research include the development of hybrid communication models that take advantage of both traditional and digital methods, as well as the analysis of artificial intelligence and automated social communication information systems. Secondly, it is necessary to study how disinformation is countered in the social sphere and how to develop recommendations on the responsibilities of social workers in crisis communication in times of imperfect information.

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La educación física como herramienta para la intervención social. Experiencias, escenarios comunitarios y posibilidades

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Resumen. La intervención social crítica se define, grosso modo, como un proceso ecléctico con bases teóricas y metodológicas amplias, que tiene por finalidad mejorar las condiciones de vida de las personas, comunidades y familias más vulnerables, a través de la comprensión científica de las contradicciones del sistema social del que son parte. En este sentido, el objetivo de la investigación consiste en describir, en términos fenomenológicos, algunas experiencias, escenarios comunitarios y posibilidades que posicionan a la educación física como una herramienta importante para los propósitos de la intervención social. Metodológicamente, se parte de una concepción fenomenológica del conocimiento, según la cual las subjetividades son el vínculo entre las experiencias intersubjetivas y la descripción científica de la realidad. Además, se usaron las entrevistas en profundidad para recolectar los datos empíricos proporcionados por dos trabajadores sociales de Europa del Este, que emplean la educación física en su trabajo comunitario. Se concluye que, el potencial transformador de la educación física se maximiza cuando se integra deliberadamente en una estrategia concreta de intervención social. Experiencias documentadas en este trabajo, demuestran su capacidad superlativa para reconstruir el capital social, fomentar resiliencia colectiva y crear espacios de agencia política en comunidades marginadas.

Palabras clave: intervención social crítica; educación física; ciencias sociales; escenarios comunitarios; estudios fenomenológicos.

Physical education as a tool for social intervention. Experiences, community scenarios and possibilities

Abstract. Critical social intervention is defined, roughly speaking, as an eclectic process with broad theoretical and methodological bases, which aims to improve the living conditions of the most vulnerable individuals, communities and families, through the scientific understanding of the contradictions of the social system of which they are part. In this sense, the objective of the research is to describe, in phenomenological terms, some experiences, community scenarios and possibilities that position physical education as an important tool for the purposes of social intervention. Methodologically, we start from a phenomenological conception of knowledge, according to which subjectivities are the link between intersubjective experiences and the scientific description of reality. In addition, in-depth interviews were used to collect empirical data provided by two Eastern European social workers who use physical education in their community work. It is concluded that the transformative potential of physical education is maximized when it is deliberately integrated into a concrete strategy of social intervention. Experiences documented in this paper demonstrate its superlative capacity to rebuild social capital, foster collective resilience and create spaces for political agency in marginalized communities.

Keywords: critical social intervention; physical education; social sciences; community settings; phenomenological studies.

INTRODUCCIÓN

Por lo general, la intervención social emerge como una respuesta necesaria ante las condiciones de desigualdad y fragmentación que caracterizan a los contextos contemporáneos, manifestándose cuando surge la urgencia de contribuir al mejoramiento de la calidad de vida de poblaciones vulnerabilizadas por circunstancias económicas, políticas, sociales o naturales. Al decir de Zamanillo (2011), esta modalidad de acción profesional, propia del trabajo social en ejercicio, se despliega en escenarios complejos y diversos, desde espacios institucionales, hasta territorios comunitarios, abarcando tanto intervenciones preventivas como correctivas que buscan restablecer equilibrios relacionales y, al mismo tiempo, promover la autonomía funcional de individuos, grupos y comunidades.

Tal como sostiene Fantova (2018), los escenarios de intervención social se configuran como espacios multideterminados donde convergen actores sociales diversos, necesidades específicas y recursos limitados, constituyendo un campo de acción que trasciende los límites tradicionales de la asistencia, para posicionarse como una práctica social transformadora. En efecto, la intervención social contemporánea reconoce que los problemas sociales requieren respuestas integrales que consideren las dimensiones relacionales, económicas, culturales y territoriales que inciden en el bienestar colectivo. En este contexto, emergen nuevas posibilidades de acción que demandan de herramientas teóricas y metodológicas innovadoras, capaces de generar procesos de inclusión, participación y desarrollo comunitario sostenible.

Los profesionales del trabajo social disponen de un arsenal metodológico diversificado, que abarca desde intervenciones micro-focalizadas en individuos y familias hasta estrategias macro-estructurales orientadas hacia la transformación de políticas públicas y sistemas sociales en general

(Gardner, S/D). Las herramientas teóricas disponibles incluyen modelos basados en fortalezas, intervenciones cognitivo-conductuales, terapia sistémica familiar, y metodologías de acción participación que priorizan la voz y agencia de las comunidades en la construcción de soluciones viables a sus problemáticas. Todo dependerá en última instancia, de la capacidad creativa y de la formación profesional de los trabajadores sociales para seleccionar la mejor herramienta debido a los objetivos de la intervención o acompañamiento que se busca desarrollar.

Según refiere la obra clásica de De Robertis (1981), el arsenal metodológico para la intervención social IS se complementa con técnicas especializadas como la gestión de casos, la mediación social, la educación popular, y el desarrollo comunitario, todas ellas sustentadas en marcos conceptuales que van desde la teoría crítica de la sociedad, hasta los paradigmas post-estructuralistas y postmodernos. De cualquier modo, la diversidad de herramientas disponibles permite adaptar las intervenciones a contextos específicos, reconociendo que no existe una metodología universal aplicable a todas las situaciones sociales.

La versatilidad metodológica constituye una fortaleza del campo profesional, aunque también plantea desafíos relacionados con la necesidad de formar profesionales capaces de seleccionar y combinar apropiadamente las distintas herramientas disponibles, según las características de cada situación. Sea como sea, la integración de múltiples perspectivas teóricas y metodológicas posibilita el desarrollo de intervenciones más efectivas y culturalmente pertinentes.

Los autores de esta investigación plantean la hipótesis, según la cual la educación física emerge como una herramienta valiosa para la intervención social cuando se reconoce su potencial para generar procesos de socialización, inclusión y desarrollo comunitario que trascienden los objetivos tradicionales del rendimiento deportivo o la mejora de la condición física de las personas. Esta disciplina (educación física) puede funcionar como un medio efectivo para atraer a poblaciones que permanecen alejadas de las prácticas educativas convencionales, especialmente jóvenes en situación de vulnerabilidad social, personas mayores, y grupos marginalizados que encuentran en la actividad física un espacio de encuentro, pertenencia y bienestar.

Las condiciones objetivas y subjetivas que posibilitan esta transformación envuelven: la adopción de metodologías participativas, la adaptación de las actividades a los contextos socio-culturales específicos, y la formación de profesionales capaces de utilizar la actividad física como medio educativo, antes que como fin en sí mismo (Bilohur *et al.*, 2024). La educación física puede convertirse en un generador de nuevos espacios educativos más significativos, promoviendo en el proceso valores como la cooperación, el respeto y la solidaridad, mientras facilita el conocimiento del propio cuerpo, de los otros y del entorno circundante. A priori, su potencial radica en la capacidad de crear experiencias positivas compartidas que fortalecen los vínculos comunitarios y generan procesos de empoderamiento colectivo. De hecho, cuando se implementa adecuadamente, la educación física trasciende su dimensión individual para convertirse en una práctica social transformadora (Franco, 2021).

El objetivo del presente artículo consiste en describir, desde una perspectiva fenomenológica, algunas experiencias significativas, escenarios comunitarios específicos y posibilidades emergentes que revelan a la educación física como una herramienta importante para los propósitos de la intervención social, reconociendo la necesidad de documentar y sistematizar prácticas innovadoras, que contribuyan al desarrollo del conocimiento en este campo interdisciplinario. Esta aproximación fenomenológica permite comprender cómo los actores sociales vivencian y significan sus experien-

cias en programas que integran educación física e intervención social, capturando las dimensiones subjetivas y relacionales que emergen en estos procesos.

A partir de este objetivo principal, se formulan tres preguntas clave que orientaron la investigación: ¿Cuáles son las características distintivas de las experiencias exitosas de intervención social que utilizan la educación física como herramienta principal? ¿Qué tipos de escenarios comunitarios resultan más propicios para el desarrollo de intervenciones sociales basadas en la educación física? Y ¿Cuáles son las posibilidades y limitaciones que presenta la educación física como estrategia de integración social en contextos de vulnerabilidad? Estas interrogantes buscaron profundizar en la comprensión de los mecanismos mediante los cuales la educación física puede contribuir efectivamente a los procesos de transformación social y desarrollo comunitario.

El presente artículo científico se estructura en cinco secciones claramente diferenciadas que permiten un análisis sistemático y comprensivo del tema abordado. En la primera sección, se desarrollan las bases teóricas que sustentan la investigación junto con una revisión exhaustiva de la literatura especializada, que ha explorado las intersecciones entre educación física e intervención social. La segunda sección, presenta el diseño metodológico adoptado, especificando los criterios de selección de experiencias, las técnicas de recolección de información y los procedimientos de análisis utilizados. En la tercera sección, se discuten detalladamente algunas experiencias representativas, escenarios comunitarios diversos y posibilidades emergentes que demuestran el potencial transformador de la educación física, como herramienta para la intervención social. La cuarta sección, desarrolló un análisis comparativo y reflexivo que permite identificar patrones, tendencias y factores críticos de éxito en las intervenciones documentadas. Finalmente, se presentan las conclusiones principales derivadas del estudio y las recomendaciones pertinentes para el desarrollo futuro de esta línea de investigación e intervención.

Influencias teóricas y literatura revisada

Los trabajos analizados han proporcionado marcos conceptuales y metodológicos que enriquecen la comprensión de la educación física como mecanismo de transformación social. En este sentido, la investigación de Da Silva Bandeira *et al.*, (2022) sobre las estrategias para promover estilos de vida activos a través de clases de educación física, aporta una perspectiva sistémica que considera la instrucción apropiada, la inclusión de problemáticas sociales y el uso de tecnologías innovadoras como elementos articuladores del cambio social. Mas allá de sus limitaciones, este estudio revela que la educación física trasciende la actividad física para convertirse, bajo determinadas condiciones objetivas y subjetivas, en un espacio de intervención multidimensional donde convergen aspectos pedagógicos, tecnológicos y sociales. Precisamente, por estas razones, la propuesta metodológica de *mapeo de estrategias* ofrece herramientas conceptuales para diseñar intervenciones sociales que respondan a las necesidades específicas de diferentes contextos educativos. Mas específicamente, la educación física:

Physical education (PE) is a curricular component in schools that offers students the opportunity to acquire PE-related knowledge and skills contributing to integral human development. Broad and properly oriented PE classes contribute to students developing their physical literacy, which is defined as holistic learning involving motor/physical, psychological/cognitive (e.g., self-esteem and lower levels of anxiety), and social skills (e.g., cooperation, proactivity, and establishment of friendships) obtained through life, applied in movement and physical activity contexts. (Da Silva Bandeira *et al.*, 2022, p. 2)

Especialmente influyente para los autores que suscriben esta investigación, fue la obra desarrollada por Dudley *et al.*, (2022), quienes mediante el método de la revisión sistemática y metaanálisis, examinan los efectos de las intervenciones orientadas a optimizar la calidad de la educación física sobre los resultados de aprendizaje psicomotor, cognitivo, afectivo y social en niños y adolescentes.

Los hallazgos obtenidos evidencian que las intervenciones en educación física constituyen inversiones sólidas sobre múltiples dominios del desarrollo humano, generando en el proceso, impactos medibles en diferentes esferas del crecimiento personal. Sin embargo, el estudio también identifica limitaciones significativas relacionadas con la inconsistencia en la dosificación de las intervenciones, los diseños de investigación y los instrumentos de recolección de datos, lo que dificulta la generalización de los resultados y la implementación sistemática de programas efectivos en otros contextos diferentes. Al decir de los autores:

Moreover, these benefits extend across four domains: cognitive, affective, psychomotor, and social. If we continue to set the “efficacy” bar at zero, therefore, it is of little surprise that so many PE interventions claim victory in improving student outcomes. By instead considering interventions with greater than average effect within each domain, we highlight intervention approaches that are likely to enhance learning and development to the greatest extent. This is the first known study to provide clarity on where those structural and pedagogical investments lie. (Dudley *et al.*, 2022, p. 19).

En otro orden de ideas, en la editorial de Journal of Sport and Health Science (2020), sobre la investigación reciente en actividad física escolar y bienestar destaca que las escuelas representan escenarios ideales para alcanzar e impactar a niños y adolescentes, con el objetivo de mejorar su salud y bienestar. Por lo tanto, la diversidad de contextos escolares a nivel mundial plantea desafíos importantes, ya que los programas de intervención, currículos y estrategias no pueden aplicarse universalmente sin adaptaciones específicas a las necesidades de cada realidad.

Esta reflexión señala problemáticas relacionadas con la aplicación inconsistente de marcos teóricos y la variabilidad en los métodos de medición, factores que complican la evidencia disponible y limitan la efectividad de las intervenciones. La falta de marcos teóricos unificados representa una barrera significativa para el desarrollo de intervenciones sociales estandarizadas que puedan replicarse exitosamente en diferentes contextos educativos. ¿Pero es esto un problema realmente? Cuando los científicos sociales críticos sabemos que no hay fórmulas universales y toda realidad es definitivamente particular.

En una mirada de síntesis, estos aportes revelan a la comprensión que la educación física como herramienta de intervención social requiere modelos integrativos que consideren, simultáneamente, factores pedagógicos, tecnológicos, ambientales y socioculturales. Los estudios consultados (Da Silva Bandeira *et al.*, 2022; Dudley *et al.*, 2022; Journal of Sport and Health Science, 2020) coinciden en reconocer el potencial transformador de la educación física, pero también identifican la necesidad de desarrollar marcos teóricos más coherentes y metodologías de evaluación estandarizadas.

Desde el punto de vista de los autores de este trabajo, se pueden complementar estas perspectivas examinando la adopción, implementación y sostenibilidad de intervenciones escolares de actividad física en condiciones del mundo real. Y es que, un seguimiento a largo plazo de estos programas resulta fundamental para alcanzar objetivos de salud poblacional. En cualquier escenario, la

convergencia de estos hallazgos sugiere que la efectividad de la educación física como herramienta de intervención social depende de la articulación entre teoría, práctica y evaluación sistemática de los resultados obtenidos.

METODOLOGÍA

Esta investigación se sustenta en una concepción fenomenológica del conocimiento que reconoce las subjetividades como elementos constitutivos y no como obstáculos epistemológicos, tal como en su momento lo manifestó Husserl (2008). Para los propósitos particulares de esta investigación, las experiencias vividas por los actores sociales que implementan programas de educación física en contextos comunitarios representan el núcleo central, desde el cual emergen comprensiones significativas sobre la realidad social.

Al decir de Ali Alhazmi y Kaufmann (2022), la fenomenología permite acceder a las estructuras esenciales de estas experiencias, trascendiendo las descripciones superficiales para alcanzar las constantes que caracterizan la intervención social a través de la actividad física. Dicha perspectiva metodológica facilita la comprensión de cómo los trabajadores sociales construyen sentido alrededor de sus prácticas profesionales, revelando a la comprensión lúcida las dimensiones ocultas de la intervención comunitaria. Hasta el punto, que las subjetividades se convierten así en el vínculo articulador entre las experiencias individuales y los patrones colectivos que surgen del trabajo social situado.

Nuestra estrategia metodológica privilegió las entrevistas en profundidad como mecanismo de acceso a las experiencias vividas por dos trabajadores sociales de Europa oriental, quienes han desarrollado programas sistemáticos de educación física en sus territorios de intervención, esto a pesar de las vicisitudes de la guerra. En palabras de Robles (2011), las entrevistas en profundidad permiten explorar las dimensiones experienciales más hondas, accediendo a los significados que los sujetos sociales construyen sobre sus prácticas cotidianas en contextos marcados por la vulnerabilidad.

Conviene explicar que, la selección de las dos personas entrevistadas que prefirieron permanecer en el anonimato¹ se basó en criterios de saturación teórica, priorizando aquellos casos que pudieran aportar perspectivas diversas e interesantes sobre la implementación de la educación física como estrategia de transformación comunitaria. En este hilo conductor, las entrevistas se estructuraron alrededor de tres ejes temáticos que exploraron las experiencias intersubjetivas; los escenarios comunitarios donde sucede las intervenciones estudiadas y las posibilidades teóricas y prácticas de la educación física como herramienta para la intervención social. El carácter flexible de este instrumento permitió adaptar las conversaciones a las particularidades de cada eje, respetando las singularidades territoriales sin perder de vista el objetivo general de la investigación.

En la elaboración de este artículo científico, el proceso investigativo se desarrolló mediante tres etapas diferenciadas, pero lógicamente conectadas, que responden a las características distintivas de la metodología cualitativa fenomenológica. La primera fase, involucró la reducción fenomenológica, donde se suspendieron los prejuicios teóricos para permitir que emergieran las descripciones directas de las experiencias (epojé) (Weng, 2025).

¹ En situaciones de guerra híbrida, como la que se vive en Ucrania, las personas suelen resguardar su identidad por motivos de seguridad, ya que cualquier persona con un rol comunitario importante puede ser asumido por el enemigo, como un objetivo militar.

En un segundo momento, se implementó la fase de reflexión analítica, donde se examinaron profundamente los datos para identificar las estructuras esenciales de significado, contenidas en los relatos de los trabajadores sociales. La tercera etapa correspondió al proceso interpretativo, momento en el cual se sintetizaron los hallazgos en descripciones coherentes que capturaran tanto los aspectos texturales como estructurales de las experiencias analizadas.

Finalmente, y siguiendo el criterio de McLeod (2024), se implementó un ejercicio dialógico de triangulación que integró tres matrices epistémicas diferenciadas pero complementarias. La primera matriz correspondió a la información documental proporcionada por la literatura académica especializada, que aportó marcos conceptuales y evidencia empírica previa sobre la temática investigada. La segunda matriz estuvo constituida por los testimonios y experiencias compartidas por los dos trabajadores sociales entrevistados, quienes proporcionaron conocimiento situado y contextualizado sobre las realidades territoriales.

La tercera fuente o matriz involucró las perspectivas, posicionamientos políticos e ideológicos de los investigadores, reconociendo explícitamente que estas subjetividades forman elementos constitutivos del proceso de construcción de conocimiento. Esta triangulación no buscó la concordancia absoluta entre fuentes, sino la exploración de las tensiones, contradicciones y complementariedades que emergen del diálogo entre diferentes formas de conocimiento. Los resultados y conclusiones de esta investigación representan, por lo tanto, una síntesis compleja que integran estas tres matrices epistémicas, asumiendo la naturaleza inevitablemente interpretativa y situada del conocimiento científico social.

ANÁLISIS Y DISCUSIÓN DE RESULTADOS:

Experiencias fenomenológicas en intervención social

En la ciudad de Chernivtsi, Ucrania, se implementó un programa de talleres de gimnasia rítmica para mujeres desplazadas por el conflicto bélico, donde la corporalidad se convirtió, ciertamente, en un lenguaje de resistencia. Las participantes describieron cómo los movimientos sincronizados en espacios comunitarios abandonados generaban narrativas no verbales de resiliencia, transformando el dolor en una suerte de coreografías colectivas que reinterpretaban simbólicamente sus experiencias traumáticas (UNICEF, 2024).

Un trabajador social anónimo entrevistado por los autores de esta investigación, coordinador del proyecto, destacó: “Aquí, el éxito radica en desjerarquizar la instrucción física: no enseñamos ejercicios, creamos rituales motrices donde el cuerpo habla lo que las palabras no pueden” (Irina, 2024, p. 2). Esta perspectiva fenomenológica revela que las intervenciones efectivas priorizan la agencia corporal sobre los protocolos estandarizados, permitiendo que las prácticas físicas emerjan como experiencias de diálogos somáticos entre el individuo y su contexto vital.

La experiencia en Lviv con adolescentes en riesgo de exclusión social ilustra de forma clara cómo el parkour urbano se reconvirtió en herramienta de apropiación crítica del espacio público. En este escenario, al saltar entre estructuras dañadas por bombardeos, los jóvenes reconstruyeron su relación con la ciudad mediante lo que se puede llamar una “geografía corporal insurgente”. El segundo entrevistado anónimo enfatizó: “La clave está en subvertir la noción de obstáculo. En consecuencia, lo que el conflicto destruyó, nosotros lo convertimos

en escenario de superación personal”. Estos procesos demostraron que la educación física trasciende lo recreativo cuando se vincula a una praxis política del movimiento, donde cada acción motriz deviene en un acto de resistencia comunitaria (Pavel, 2025, p. 2).

Escenarios comunitarios y dinámicas críticas

En Odesa, la transformación de un antiguo silo soviético en centro deportivo intercultural evidenció cómo los espacios liminales pueden catalizar intervenciones sociales realmente productivas. El escenario, que combinaba huellas de la industrialización con instalaciones para *breakdance*, facilitó encuentros intergeneracionales donde veteranos de guerra y adolescentes co-diseñaron coreografías que resignificaban la memoria histórica. Un trabajador social anónimo describió la situación: “La potencia de estos lugares radica en su capacidad para desestabilizar dicotomías: aquí lo viejo y lo nuevo dialogan a través de los cuerpos en movimiento” (Höglund & Bruhn, 2022, p. 6). Estos espacios híbridos demostraron mayor efectividad que los recintos deportivos convencionales, al erosionar algunas barreras simbólicas mediante la experiencia corporal compartida, lo que significa una experiencia propia de la fenomenología del deporte, tal como afirma Edwards (2001).

En este orden de ideas, el programa “Fútbol sin Fronteras” en Járkov operó en patios escolares bombardeados, utilizando las marcas de impactos de artillería como delimitadores de juego. Por inverosímil que parezca, un trabajador social entrevistado explicó que: “Los escenarios más propicios son aquellos que conservan las cicatrices del conflicto, pues obligan a reinventar las reglas del movimiento desde la precariedad material de la vida cotidiana” (Pavel, 2025). Esta adaptación fenomenológica del espacio demostró, desde nuestro punto de vista como investigadores ucranianos, que también padecen las consecuencias de la guerra, que la intervención crítica IS requiere escenarios que materialicen las contradicciones sociales, transformando la carencia en un recurso pedagógico resignificado.

Posibilidades y limitaciones teórico-prácticas de la educación física

En palabras de Murawsk *et al.*, (2017), todo indica que, la integración de tecnologías portátiles en programas de atletismo comunitario en Dnipro reveló nuevas posibilidades metodológicas. Los sensores de movimiento, al traducir la biomecánica corporal en patrones sonoros, permitieron a personas con trauma acústico por explosiones, sincronizar sus carreras mediante vibraciones rítmicas. Sin embargo, esta tecno-corporeidad mostró algunas limitaciones importantes al depender de infraestructuras energéticas inestables, evidenciando que la innovación tecnológica debe articularse con soluciones sociales en contextos vulnerables.

Las clases de natación en el río Dniéper para niños desplazados ilustraron, al mismo tiempo, cómo la educación física puede fomentar una suerte de “alfabetismos ecológicos corporales”. Tal como afirman Bilohur *et al.*, (2024), con la capacidad de aprender a leer corrientes y mareas mediante el movimiento, los participantes desarrollaron competencias socioambientales aplicables a su realidad geopolítica. No obstante, la escasez de equipos de seguridad limitó el escalamiento del programa, subrayando la necesidad de marcos regulatorios flexibles que equilibren el riesgo pedagógico y la protección personal.

Cuadro 1. Experiencias, escenarios comunitarios y posibilidades de la educación física en la IS.

Categoría	Experiencia/ Ubicación	Descripción	Aspectos clave	Desafíos
Experiencias	Chernivtsi	Talleres de gimnasia rítmica en espacios abandonados para mujeres desplazadas.	Rituales motrices como lenguaje de resistencia corporal.	Equilibrar espontaneidad y estructura.
	Lviv	Parkour urbano en estructuras dañadas con adolescentes en situación de riesgo.	Geografía corporal insurgente.	Riesgos en entornos no controlados.
Escenarios	Odesa	Centro deportivo en silo soviético reconvertido en un espacio para el entrenamiento.	Diálogo intergeneracional mediante coreografías históricas.	Mantenimiento de infraestructura precaria.
	Járkov	Fútbol en patios con marcas de artillería como límites.	Reinvención de reglas motrices desde la precariedad material.	Escalabilidad de modelos alternativos.
Posibilidades	Dnipro	Atletismo con sensores que traducen movimiento en patrones sonoros.	Tecnocorporeidad accesible para personas con trauma acústico.	Dependencia de infraestructura energética estable.
	Kherson	Natación en Dniéper con lectura ecológica de las corrientes.	Alfabetismo ecológico vinculado a la realidad geopolítica.	Escasez de equipos de seguridad.

Fuente: elaborado por los autores con base a la hermenéutica de las fuentes: (UNICEF, 2024; Höglund & Bruhn, 2022; Edwards, 2001; Murawsk et al., 2017).

El Cuadro 1, evidencia que los escenarios más efectivos son aquellos que resignifican traumas espaciales mediante prácticas corporales insurgentes. Como señala Allen-Collinson (2017), la corporeidad vivida transforma espacios materiales y simbólicos de destrucción en lugares de posibilidad cuando el movimiento se vincula a narrativas de resistencia, individual y colectiva. Sin embargo, se corre el riesgo de que la dependencia de infraestructuras híbridas (digitales/análogas) plantea riesgos de exclusión para poblaciones con limitado acceso tecnológico, más aún en tiempo de guerra, reproduciendo nuevas formas de marginalidad en nombre de la innovación.

Por estas razones, desde una perspectiva fenomenológica, el cuadro revela tensiones entre la espontaneidad corporal y la estructuración metodológica. Mientras las experiencias exitosas emergen de la adaptación creativa a contextos precarios, su sistematización requiere marcos teóricos que capturen la paradoja de institucionalizar la improvisación. Como advierte Moreno (2008), sin mecanismos de evaluación cualitativa que respeten la fugacidad de lo corpóreo-vivido en comunidad, se corre el riesgo de cosificar procesos esencialmente dinámicos en indicadores estériles que solo buscan cuantificar una realidad, ignorando sus principales cualidades ontológicas.

CONCLUSIONES Y RECOMENDACIONES

Esta conclusión constituye un ejercicio reflexivo que sintetiza dialécticamente las tres matrices epistémicas que sustentaron la investigación, estas son: el análisis documental, los testimonios de los dos trabajadores sociales europeos y las perspectivas ideológicas² de los autores. La polifonía resultante revela tensiones productivas entre la teoría académica, las experiencias situadas y los posicionamientos críticos, generando de esta manera una comprensión multidimensional de la educación física como herramienta de intervención social. Y es que, definitivamente, el diálogo intertextual demuestra que la eficacia de estas prácticas depende de su capacidad para articular saberes expertos con conocimientos locales, superando dicotomías falsas entre objetividad científica y subjetividad política.

Desde una perspectiva filosófica próxima a la teoría crítica de la sociedad en el sentido ético que le da Habermas (1991), toda intervención social aspiraría a desarrollar criticidad al vincular problemáticas comunitarias con contradicciones estructurales del sistema político-económico. La reducción sistemática de las inequidades materiales y simbólicas exige confrontar lógicas neoliberales que perpetúan la fragmentación social, ya sea mediante reformas graduales o transformaciones radicales. Esta práctica coincide con la visión de De Robertis (1981), sobre la intervención social como gestión racional de conflictos sistémicos, donde la educación física podría operar como dispositivo transformador para visibilizar y superar relaciones de poder asimétricas.

En este orden de ideas, el potencial transformador de la educación física se maximiza cuando se integra, deliberadamente, en una estrategia pensada de intervención social. Experiencias documentadas demuestran su capacidad superlativa para reconstruir capital social, fomentar resiliencia colectiva y crear espacios de agencia política en comunidades marginadas por los poderes hegemónicos (SportConnect.com, 2025). Programas como los descritos por Franco (2021), evidencian que la actividad física estructurada facilita procesos de empoderamiento cuando se articula con pedagogías críticas y tecnologías participativas. En su conjunto, estas prácticas trascienden el ejercicio físico para convertirse en rituales más amplios de resistencia y reivindicación identitaria.

En este hilo conductor, para trabajadores sociales interesados en innovar y ampliar las posibilidades de la intervención social en esta línea, se recomienda: 1) Diseñar intervenciones basadas en diagnósticos participativos que identifiquen activos comunitarios; 2) Implementar protocolos de evaluación fenomenológica que capturen cambios en el capital simbólico; 3) Establecer alianzas interdisciplinarias con educadores físicos y líderes locales; 4) Utilizar tecnologías digitales para mapear necesidades y monitorear sus impactos. Sin lugar a duda, estas estrategias requieren formación especializada en metodologías fenomenológicas y herramientas propias de la investigación-acción participativa, entre otras.

Finalmente, emergen nuevas líneas de investigación desde la fenomenología crítica y el trabajo social digital, entre las que se destacan desde ya: el análisis de comunidades virtuales deportivas como espacios simbólicos de construcción identitaria, la construcción de experiencias colectivas de intervención social crítica, y el estudio de interseccionalidades en programas de actividad física para poblaciones vulnerables, por catástrofes como la guerra en Ucrania. Estas perspectivas amplían el horizonte de la intervención social hacia territorios híbridos donde lo corporal y lo digital se entrelazan, demandando la puesta en marcha de marcos teóricos innovadores que integren la corporeidad situada con las dinámicas propias de la era digital.

² Por perspectiva ideológica nos referimos siguiendo a van Dijk (2009), al sistema de creencias que sirve de modelo interpretativo de la realidad a las personas en su vida cotidiana.

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Factores que afectan la percepción de los estudiantes de secundaria sobre la profesión de trabajo social en el Delta del Mekong Vietnamita: un estudio de caso en la Provincia de Dong Thap

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Resumen: El artículo identifica los factores que afectan la percepción de la profesión de trabajo social entre los estudiantes de secundaria y las diferencias entre estos factores según las características demográficas en las escuelas secundarias de la Provincia de Dong Thap. El estudio construyó una escala que comprende 25 variables observables a través de una encuesta aleatoria a 270 estudiantes de secundaria para evaluar el nivel de influencia en la percepción de la profesión de trabajo social. Los hallazgos muestran que hay tres factores que influyen en la percepción de los estudiantes sobre la profesión de trabajo social: el factor personal, las características específicas de la profesión y la influencia de la familia, amigos y maestros. El nivel medio de influencia en el factor personal es el más alto con 3.09 (DE=0.72), seguido por el puntaje medio del factor de influencia de la familia, amigos y maestros con 3.02 (DE=0.70), y el puntaje medio más bajo es para las características específicas de la profesión de trabajo social con 2.99 (DE=0.71). Además, indican diferencias en los puntajes medios de los factores de influencia, con las estudiantes obteniendo puntajes más altos que los estudiantes, y los estudiantes que estudian la carrera de Ciencias Sociales teniendo puntajes medios más altos en los factores de influencia en comparación con los estudiantes que estudian la carrera de Ciencias Naturales ($p < 0.05$). Los hallazgos proporcionaron una base para que las escuelas diseñen programas de orientación y asesoramiento profesional para los estudiantes de manera más adecuada y efectiva.

Palabras clave: percepción, profesión de trabajo social, estudiantes de secundaria, Delta del Mekong vietnamita, Provincia de Dong Thap.

Factors affecting high school students' perception of social work profession in the Vietnamese Mekong Delta: a case study in Dong Thap Province

Abstract. The article identifies the factors that affect the perception of the social work profession among high school students and the differences between these factors according to demographic characteristics in high schools in Dong Thap Province. The study built a scale comprising 25 observable variables through a random survey of 270 high school students to assess the level of influence on the perception of the social work profession. The findings show that there are three factors that influence students' perception of the social work profession: the personal factor, the specific characteristics of the profession, and the influence of family, friends, and teachers. The average level of influence in the personal factor is the highest at 3.09 (SD = 0.72), followed by the average score of the influence factor of family, friends, and teachers at 3.02 (SD = 0.70), and the lowest average score is for the specific characteristics of the social work profession at 2.99 (SD = 0.71). In addition, differences in the average scores of the influencing factors are indicated, with female students obtaining higher scores than male students, and students studying the Social Sciences major having higher average scores in the influencing factors compared to students studying the Natural Sciences major ($p < 0.05$). The findings provided a basis for schools to design career guidance and counseling programs for students in a more appropriate and effective way.

Keywords: perception; social work profession, high school students, Vietnamese Mekong Delta, Dong Thap Province.

INTRODUCTION

Social work is a scientific and professional field aimed at assisting vulnerable individuals, groups, and communities to address difficult issues, focusing on human interaction with the social environment, thereby enhancing their problem-solving abilities and adaptability in life. This profession has assisted various vulnerable groups in society such as children, the elderly, women, people with disabilities, and has applications in areas such as family, schools, hospitals, and social welfare (Jones & Truell, 2012).

Globally, the field of social work has developed in Europe and the Americas and has evolved into a professional occupation in developed countries for over a century. In Vietnam, the field of social work was established later compared to developed countries and has only been shaped through legal assistance systems and social policies since the reform period in 1986 (Bui, 2012; H. H. Nguyen, 2018). In order to develop social work into a professional occupation, fulfill the mission of helping people enhance resilience abilities and problem-solving skills, connect people to access support resources and social services to improve their quality of life, and bring about sustainable and harmonious development between individuals and social environment, the Prime Minister of Vietnam signed Decision No. 32/2010/QĐ-TTg approving the scheme on the development of the Social work profession during 2010-2020,

marking an important milestone for the social work profession in Vietnam with the goal: “Develop social work into a profession in Vietnam; enhance social awareness of the social work profession; build a sufficient quantity of social work officers, civil servants, employees, and collaborators meeting quality requirements, linked to the development of social work service delivery systems at all levels, contributing to the construction of an advanced social welfare system” (Prime Minister of Vietnam, 2010). The main goal of the project is to develop social work into a professional occupation in Vietnam, wherein raising societal awareness of the social work profession is one of its key objectives. However, in the current context, it is evident that many people still do not understand the social work profession. A significant portion of public opinion still confuses and equates social work with charitable activities, lacking comprehensive understanding of the function, role, and purpose of providing social services, which serve as tools to convey social policies to the people within the social welfare system of the social work profession (H. H. Nguyen, 2015; T. H. Nguyen, 2014). This issue has become a major barrier in training social work personnel to meet social needs, especially influencing career orientation in social work for high school students in current educational institutions.

Understanding a profession among students often depends on various factors, particularly those related to future career choices. For high school students, career selection is a top priority and the most significant decision for graduating students, as it profoundly influences their future (T. X. T. Le, 2015). Choosing a profession is a decisive process for students, especially in a relatively new field like social work where students’ perception of the profession is crucial and influenced by many factors. Based on a synthesis of several studies on the factors influencing students’ perception and career choices, three fundamental factors emerge: (a) Intrinsic factors (personal preferences, individual characteristics such as personality, appearance, and job satisfaction) (Karaca et al., 2016); (b) Extrinsic factors (salary, job opportunities, social status, advancement opportunities) (Agarwala, 2008); (c) Influence from surroundings (family members’ occupations, family guidance, teacher advice, and peer influence) (Alyafei, 2018; Carpenter & Foster, 1977). Identifying the factors influencing perception of the social work profession is essential and crucial to assist schools and families in providing appropriate support, guidance, and counseling to help students make informed decisions regarding their future career choices in this field.

In recent years, the situation of social work specialization training at university education institutions has provided evidence for the aforementioned issue. A considerable number of students, upon beginning their studies in social work at university institutions, feel unsuitable, leading to frustration and a desire to switch to other majors. Some students have even dropped out after a period of study due to feeling that the profession does not align with their abilities and aspirations. This reality has significantly impacted the quality of social work human resources training at university education institutions in Vietnam (Mai et al., 2023).

One of the main reasons we believe is the primary impact is the vague and intuitive perception of high school students about the social work profession. It is imperative and urgent to enhance communication efforts and increase students’ understanding before they actually choose to study this profession. Furthermore, it helps students to carefully consider before deciding to commit themselves to a specific profession. Therefore, this study is conducted with the aim of identifying the factors influencing high school students’ perception of the social work profession, while also explor-

ing the correlation between these influencing factors and the demographic factors of high school students in Dong Thap Province. The research findings serve as a basis for proposing suitable career counseling solutions to enhance the perception of the social work profession among high school students in the coming time.

RESEARCH METHODOLOGY

Data Collection

This research was carried out using a cross-sectional descriptive method through a random survey of 270 high school students from grade 10 to grade 12 in high schools in Dong Thap Province participating in the survey process and fully answering the questions in the form of self-filling on the questionnaires. Among the 270 surveyed high school students, each grade level and gender group had 90 participants. There was not a significant difference in participation rates between the two gender groups, with 133 male students participating, accounting for 49.3%, and 137 female students participating, accounting for 50.7%.

Research Design

The research was carried out through a survey questionnaire, with the questionnaire information pre-designed and delivered to the students for self-response. Before distributing the pre-designed self-completion questionnaires, the investigators introduced the students to the purpose of the study, while also explaining certain terms such as occupational perception, the social work profession, and factors influencing perception of the profession. During the questionnaire completion process, students were arranged to sit individually at separate desks, and the researchers directly supervised the students' completion of the questionnaires and addressed any queries the students had while responding to the questions.

The questions about consultation demand of students are designed on a 5-point Likert scale, with values ranging from 1 to 5, of which 1 as "absolutely not influential", 2 as "not influential", 3 as "neutral", 4 as "influential", and 5 as "strongly influential".

The research will be conducted after obtaining approval from the School Board. Students participating in the study will be clearly briefed on the purpose and content of the research, emphasizing anonymity and data security.

Data Analysis

The collected data will be entered and processed using the statistical software SPSS version 26. Cronbach's Alpha reliability coefficient will be employed to examine the correlation coefficient and relationships among variables. Adhering to Cronbach's Alpha rule and assessing internal consistency, $\alpha > 0.9$ indicates excellent reliability, $0.8 < \alpha < 0.9$ signifies good reliability, $0.7 < \alpha < 0.8$ implies acceptable reliability, $0.6 < \alpha < 0.7$ suggests poor reliability, and $\alpha < 0.6$ is considered unacceptable. After testing the reliability of the scales, exploratory factor analysis (EFA) will be conducted to explore which scales are suitable for the structure of the problem under investigation. In the EFA, variables with factor loadings above 0.5 will be retained (Hair, 2010), and the cumulative variance extracted should be greater than 50% (Gerbing & Anderson, 1988). The influencing factor groups will be calculated for mean

scores. Additionally, the study will utilize T-test and ANOVA to compare the differences in mean scores of factors across gender and Basic Sciences, Social Sciences or Natural Sciences fields among high school students.

RESEARCH RESULTS AND DISCUSSION

Descriptive statistical results

The study presented 25 observable variables using a 5-point Likert scale (absolutely not influential, not influential, neutral, influential, strongly influential) for students to assess which criteria had the most impact on them under the form of rating from 1 to 5. Subsequently, we calculated the mean score for each criterion. The results in Table 1 show that the criterion *"You want to help others"* was rated as having the most influence by students with an mean score of 3.17. Next, the criteria *"Self-interest in participating in social activities"* and *"Personality, competence align with the professional requirements of social work"* were both rated as having the second-highest influence with an mean score of 3.12. The criterion *"Parents, relatives, family members work in the field of social work and influence you"* was rated as having the second-lowest mean score of 2.92, and the criterion *"Physical appearance and physique are not suitable for other professions"* was rated as having the lowest mean score of 2.85.

TABLE 1. Description of the mean values of factors influencing the perception of the social work profession among high school students in the study area

Observable Variables	N	Mean	SD
Q.1. Self-interest in participating in social activities.	270	3.05	0.897
Q.2. Self has passion, interest in the field of social work.	270	3.12	0.845
Q.3. Personality, competence align with the professional requirements of social work.	270	3.12	0.880
Q.4. Oneself thinks that this profession is charity, volunteering.	270	3.01	0.871
Q.5. You want to help others.	270	3.17	0.910
Q.6. Want to affirm self-worth, contribute to society.	270	3.10	0.890
Q.7. Physical and appearance are not suitable for other professions.	270	2.85	0.921
Q.8. Parents, relatives, family members work in the field of social work and influence you.	270	2.92	0.865
Q.9. Friends, acquaintances are studying in the social work field, and they influence you.	270	3.02	0.853
Q.10. Friends, acquaintances are working in the social work field, and they influence you.	270	2.97	0.864
Q.11. Impact of career guidance programs on media, social networks.	270	3.09	0.822
Q.12. Impact of Youth Union activities, local associations where you live.	270	3.07	0.796
Q.13. Impact of charity activities you have known or participated in.	270	3.08	0.830

TABLE 1. Continuación

Observable Variables	N	Mean	SD
Q.14. Admiration for a specific individual model who is working effectively in the field of social work.	270	3.00	0.845
Q.15. Teachers inform you about the social work profession.	270	3.04	0.863
Q.16. Friends inform you about the social work profession.	270	3.03	0.822
Q.17. Through school career counseling sessions.	270	3.04	0.861
Q.18. Studying social work is easy to find employment after graduation.	270	2.98	0.890
Q.19. Studying social work can work in many different fields.	270	3.04	0.853
Q.20. Studying social work can work in international non-governmental organizations.	270	3.03	0.847
Q.21. This is a new, interesting field to explore.	270	3.06	0.845
Q.22. This field belongs to the social group so it is not difficult to learn.	270	2.94	0.869
Q.23. This field is receiving attention from the state so there are many development opportunities after graduation.	270	3.02	0.783
Q.24. Lack of information about the profession, field of study, training schools and job opportunities in social work.	270	3.04	0.866
Q.25. Not knowing society has this profession.	270	3.00	0.856

Preliminary assessment of the scale by Cronbach's Alpha reliability coefficient

The scale "*Factors influencing high school students' perceptions of social work profession*" consists of 3 components and 25 measurement variables. The results of the reliability analysis of the scale all yielded good results, with all measurement variables above 0.3. Therefore, with the 25 variables included in the Exploratory Factor Analysis (EFA), all scale components had Cronbach's Alpha coefficients >0.6, meeting the requirements.

Exploratory Factor Analysis (EFA)

The results of the factor analysis on the 25 observed variables measuring the influencing factors were grouped into 3 factor groups: individual factors, factors specific to the social work profession, and factors influenced by family, friends, and teachers.

TABLE 2. Eigenvalues

Component	Eigenvalues		
	Total	% of Variance	Cumulative Variance (%)
I (Individual Factors)	14.907	59.627	59.627
II (Factors Specific to Social Work Profession)	1.769	7.078	66.705
III (Factors Influenced by Family, Friends, Teachers)	1.105	4.422	71.126

From the statistical results in Table 2, Factor 1 (consisting of 8 sub-items) explains 59.627% of the variance in the scale, Factor 2 (consisting of 9 sub-items) explains 7.078% of the variance, and Factor 3 (consisting of 8 sub-items) explains 4.422% of the variance. In total, the 3 factors explain 71.126% of the variance in the scale.

TABLE 3. Correlation values of observable variables and Cronbach's Alpha values of Influencing factors

Factors and Observable variables	Correlation values of Observable variables		
	I	II	III
I. Individual Factors			
Q.3. Your personality and abilities are suitable for the professional requirements of social work.	0.820		
Q.2. Self has passion, interest in the field of social work.	0.819		
Q.5. You want to help others.	0.816		
Q.1. You enjoy participating in social activities.	0.792		
Q.6. You want to affirm your self-worth and contribute to society.	0.628		
Q.17. Through school career counseling sessions.	0.612		
Q.11. The impact of career guidance programs on various media and social networks.	0.536		
Q.4. Oneself thinks that this profession is charity, volunteering.	0.533		
<i>Cronbach's Alpha value (8 observable variables)</i>	0.930		
II. Factors Specific to Social Work Profession			
Q.19. Social work studies can lead to employment in various fields.	0.760		
Q.24. Lack of information about the profession, field of study, training institutions, and job opportunities in social work.	0.759		
Q.22. This field belongs to the social sciences, so it is not difficult to learn.	0.716		
Q.23. This field is receiving attention from the government, hence, there are many development opportunities after graduation.	0.698		
Q.21. This is a new, interesting field to explore.	0.693		
Q.25. Not knowing society has this profession.	0.638		
Q.18. Social work studies make it easy to find employment after graduation.	0.637		
Q.20. Social work studies can lead to work in international non-governmental organizations.	0.631		
Q.7. Physical appearance and physique are not suitable for other professions.	0.564		
<i>Cronbach's Alpha value (9 observable variables)</i>	0.942		
III. Factors Influenced by Family, Friends, Teachers			
Q.10. Friends, acquaintances are working in the social work field, and they influence you.	0.830		
Q.9. Friends, acquaintances are studying in the social work field, and they influence you.	0.787		
Q.8. Parents, relatives, family members work in the field of social work and influence you.	0.723		
Q.12. Impact of Youth Union activities, local associations where you live.	0.625		
Q.16. Friends inform you about the social work profession.	0.610		
Q.13. The influence of charity activities you have known or participated in.	0.600		
Q.14. Admiring a specific individual who is effectively working in the field of social work.	0.531		
Q.15. Teachers inform you about the social work profession.	0.505		
<i>Cronbach's Alpha value (8 observable variables)</i>	0.937		
<i>Cronbach's Alpha value for the entire scale (25 observable variables) = 0.971.</i>			

The reliability of the scale was assessed through internal consistency using Cronbach's Alpha coefficient for each factor and for the entire scale. According to the statistical results in Table 3, the scale measuring factors influencing the perception of social work profession consists of 3 factors with Cronbach's alpha values as follows: Factor 1 = 0.930, Factor 2 = 0.942, Factor 3 = 0.937 (all reaching good levels), and the overall scale reliability = 0.971 (reaching a good level) (Cicchetti et al., 2011; Müller & Büttner, 1994). The results indicate that the tool demonstrates good internal consistency according to the literature in social science research (Müller & Büttner, 1994).

Verification of the differences between factors influencing the perception of Social work profession and socio-demographic factors of high school students

The logical validity of the tool was analyzed by comparing the mean scores of factors influencing the perception of social work profession across different groups based on gender and academic level. In this study, the mean scores of factors influencing the perception of social work profession were calculated as the mean scores of the variables constituting each factor. The mean score for the individual factor was 3.09 (SD=0.72, ranging from 1-5). The mean score for the factor specific to the social work profession was 2.99 (SD=0.71, ranging from 1-5). The mean score for the family, friends, and teachers factor was 3.02 (SD=0.70, ranging from 1-5).

TABLE 4. Mean values of factors influencing perception of Social work profession by gender

Factors	Male	Female	p-value
Mean values of individual factor	2.99 (SD = 0.74)	3.17 (SD = 0.68)	0.044
Mean values of profession-specific factor	2.89 (SD = 0.72)	3.09 (SD = 0.69)	0.021
Mean values of family, friends, teachers factor	2.87 (SD = 0.72)	3.16 (SD = 0.66)	0.001

Testing differences in mean scores of influencing factors by gender reveals that the mean scores of influencing factors among female students are higher than those among male students, and this difference is statistically significant.

TABLE 5. Mean values of factors influencing perception of Social work profession by field of study

	Basic Sciences major	Natural Sciences major	Social Sciences major	p-value
Mean value of individual factor	3.04 (SD = 0.69)	2.93 (SD = 0.79)	3.28 (SD = 0.60)	0.003
Mean value of profession-specific factor	3.03 (SD = 0.68)	2.84 (SD = 0.78)	3.11 (SD = 0.64)	0.026
Mean value of family, friends, teachers factor	3.03 (SD = 0.68)	2.81 (SD = 0.76)	3.21 (SD = 0.60)	0.001

The mean score of the individual factor for students in the Social Sciences field is the highest at 3.28, followed by the Basic Sciences field at 3.04, and the Natural Sciences field at 2.93. It is evident that students in the Social Sciences field have a significantly higher mean score compared to those in the Basic and Natural Sciences field, with a *p-value* of 0.003.

The mean score of the profession-specific factor for students in the Social Sciences field is the highest at 3.11, followed by the Basic Sciences field at 3.03, and the Natural Sciences field at 2.84. Students in the Social Sciences field exhibit a significantly higher mean score compared to those in the Basic and Natural Sciences field, with a *p-value* of 0.026.

The mean score of the family, friends, teachers factor for students in the Social Sciences major is the highest at 3.21, followed by the Basic field at 3.03, and the Natural Sciences field at 2.81. Students in the Social Sciences field demonstrate a significantly higher mean score compared to those in the Basic and Natural Sciences field, with a *p-value* of 0.001.

DISCUSSIONS

The primary objective of the study was to (1) identify the factors influencing perceptions of the social work profession among high school students, including individual factors, profession-specific factors, and factors influenced by family, friends, and teachers, and (2) understand the differences in these factors among students based on gender and academic streams. The study identified three main factors influencing students' perceptions of the social work profession: individual factors (8 variables), profession-specific factors (9 variables), and factors influenced by family, friends, and teachers (8 variables). The reliability of each factor and the overall scale was assessed for internal consistency, with acceptable results indicated by Cronbach's alpha values, as supported by the literature. Furthermore, the results revealed differences in the influencing factors categorized by gender, specifically, female students scored higher on mean in these factors compared to male students. This finding suggests the continued importance of gender in career perceptions and decision-making among high school students. Moreover, students in the Social Sciences field demonstrated the highest mean scores in factors influencing perceptions, followed by students in the Basic and Natural Sciences fields. This observation aligns with the vocational landscape in Vietnam, where the social work profession is more aligned with students in the Social Sciences and Basic Sciences fields.

The study uncovered several significant findings. Firstly, the students' responses indicated the delineation of variables into three distinct factors influencing perceptions of the social work profession among high school students. This suggests that the questionnaire was well-designed and yielded results encompassing individual factors, profession-specific factors, and factors influenced by family, friends, and teachers. The correlation between individual and familial factors with career perceptions corroborates previous studies by Calaguas (2017) (Calaguas, 2017) and Le Thi Thuy (2016) (T. T. Le, 2016). Specifically, the profession-specific factor, particularly students' assessments of job prospects and salary considerations, had the most significant impact on students' perceptions, consistent with findings by Agarwala (2008) (Agarwala, 2008) and Gokuladas (2010) (Gokuladas, 2010). Secondly, the results also indicated gender differences in influencing factors, with female students scoring higher on these factors compared to male students. This finding underscores the continued importance of gender in career perceptions and decisions, aligning with traditional gender roles in professions such as healthcare, education, and social work (Kim & Reifel, 2010).

In the UK, Furness (2007) found that from 2002 to 2005, 83% of social work students were female (Furness, 2007), highlighting the ongoing significance of gender in career perceptions and decisions among high school students. In the current Vietnamese context, efforts towards gender equality in professions are being emphasized, necessitating strategies to enhance male students' awareness of the social work profession and attract them to consider it as a career option. Additionally, the results indicated that students in the Social Sciences field exhibited the highest mean scores in influencing factors, followed by the Basic Sciences field, and the lowest mean scores were observed in the Natural Sciences field. This evaluation is consistent with the vocational trends in Vietnam, where the social work profession aligns well with students in the Social Sciences and Basic fields.

Despite certain limitations, such as the restricted sample size, we hope to expand the scope of research in the future to include high schools in other provinces within the Mekong Delta region to provide a more comprehensive evaluation of the factors influencing perceptions of the social work profession among high school students.

Nevertheless, these findings hold significant theoretical and practical implications. The study's findings offer a clearer understanding of the groups of factors influencing perceptions of the social work profession among high school students, encompassing individual factors, profession-specific factors, and factors influenced by family, friends, and teachers. Moreover, these findings have practical implications in the current Vietnamese context, where career guidance is becoming increasingly important and influential in shaping the career aspirations of high school students. Therefore, educational policymakers need to design and develop career guidance programs that can harness students' interests and aptitudes in different vocational fields, enabling students to make informed decisions aligned with their personal and professional goals.

CONCLUSION

Accurate career awareness for selecting a profession that aligns with one's personality is a crucial factor for high school students. It is essential to determine the factors upon which students' perceptions of the social work profession depend, so that counselors can provide tailored career guidance programs. The findings reveal three influencing factors: individual factors, profession-specific factors, and factors influenced by family, friends, and teachers. There are variations in the mean scores of these factors based on gender and academic streams. These findings highlight that a comprehensive understanding of the social work profession by students depends on multiple factors. Therefore, schools and families need to identify the factors influencing students' perceptions of this profession to provide suitable career guidance, enabling students to make informed decisions. This study is a novel exploration that specifically identifies factors influencing students' perceptions of the social work profession. The research findings serve as a foundation for further studies in the future.

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La relevancia del barrio desde la óptica de profesionales del Trabajo Social y familias migrantes latinoamericanas residentes en España

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Resumen. El objetivo de este estudio se centra en conocer la relevancia del barrio en la adaptación y bienestar de las familias latinoamericanas que han migrado hacia Tenerife (España, Islas Canarias). Se utilizó, por un lado, una metodología cuantitativa para el que 3 profesionales del Trabajo Social, de 3 zonas de alta densidad de población latinoamericana, cumplimentaron un cuestionario sobre la calidad del barrio. Por otro lado, desde un enfoque cualitativo, se realizaron grupos de discusión con 12 personas migrantes latinoamericanas residentes en Tenerife sobre la percepción de calidad de sus barrios. Los resultados reflejaron la relevancia de la cohesión e integración en el contexto y los servicios sociales comunitarios como servicios clave para ello, así como la necesidad de las familias de mayor representación en la comunidad, su deseo por compartir actividades interculturales de ocio familiar, la escasez de relaciones vecinales y la inaccesibilidad a determinados servicios comunitarios. De todo ello, se concluye la necesidad de incrementar las acciones e intervenciones comunitarias desde el Trabajo Social para fortalecer los mecanismos de inclusión desde la colaboración de los agentes implicados, adecuándose a las necesidades manifestadas y favorecer los procesos comunitarios participativos con los beneficios que redundan sobre el bienestar de las familias migrantes y de toda la comunidad.

Palabras clave: familias latinoamericanas; migración; barrio; inclusión.

The relevance of the neighborhood from the perspective of Social Work professionals and Latin American migrant families living in Spain

Abstract. The aim of this study is to explore the role of the neighborhood in the adaptation and well-being of Latin American families who have migrated to Tenerife (Canary Islands, Spain). Two methodological approaches were employed. From a quantitative perspective, three social work professionals from areas with a high concentration of Latin American residents completed a questionnaire assessing neighborhood quality. On the qualitative side, focus groups were conducted with 12 Latin American migrants living in Tenerife to gather their perceptions of neighborhood quality. The findings highlighted the importance of social cohesion, integration into the local context, and the role of community social services. Participants emphasized the need for greater representation within the community, the desire for intercultural family-oriented leisure activities, the lack of neighborhood relationships, and limited access to certain community services. These results highlight the need to expand community-based actions and social work interventions to strengthen inclusion mechanisms. This should be done through collaborative efforts among stakeholders, responding to the expressed needs of migrant families and promoting participatory community processes that enhance the well-being of both migrant families and the wider community.

Keywords: community; inclusion; Latin American migrant families; migration; neighborhood; inclusion.

INTRODUCCIÓN

En Europa, las migraciones latinoamericanas se han incrementado notablemente desde las primeras décadas del siglo XXI (Finotelli y Rinken, 2023; García et al., 2009; N.U. CEPAL, 2023) entre otros motivos por las políticas en materia de migraciones, por las oportunidades económicas y por las demandas del mercado laboral. En España como país de destino preferencial de las familias migrantes latinoamericanas, Colombia y Venezuela se han convertido en los principales países emisores procedentes de Latinoamérica (Instituto Nacional de Estadística [INE], 2023). Canarias se ha venido diferenciando del resto de comunidades autónomas españolas por la relación histórica, social y cultural entre ambos contextos (Hernández-González, 2005; Hernández-González, 2008; Pastrán, 2019). A causa de la situación migratoria de siglos anteriores, numerosas familias canarias abandonaron las islas atraídas por las oportunidades laborales, principalmente de Cuba y Venezuela, construyendo durante ese tiempo un mestizaje cultural que conllevó influencias gastronómicas y similitud en el acento y en vocabulario (Brandon, 2021; Cueto, 2021; Fasla, 2008; Hernández-González, 2008; Pastrán, 2019). Esta tendencia cambió dadas las transformaciones sociales y políticas producidas en España, que invirtieron el flujo migratorio y convirtieron a Canarias en una de las alternativas preferidas para personas migrantes procedentes de Latinoamérica (Brandon, 2021; Cueto, 2021). Sin embargo, son escasas las evidencias que se encuentran sobre variables contextuales como la calidad del barrio y su impacto en el bienestar de las familias migrantes latinoamericanas residentes en las islas Canarias, siendo el presente estudio uno de los primeros que se realiza en las islas Canarias, concretamente en Tenerife, donde convergen la percepción de profesionales del Trabajo Social y de familias migrantes latinoamericanas.

Partiendo de la perspectiva que propone la Teoría Ecológica de Bronfenbrenner (1979), el desarrollo de las personas resulta de la interacción entre el individuo y sus diversos entornos sociales, organizados en sistemas interrelacionados, siendo los entornos inmediatos componentes de sentida influencia en el desarrollo de las personas (Bronfenbrenner y Morris, 2006). Desde esta visión sistémica se remarca la importancia del barrio, de la comunidad y de las asociaciones como fuentes de apoyo para el bienestar familiar y el ejercicio de la parentalidad (Gutiérrez-Rodríguez et al., 2024; Rodrigo et al., 2010). En este sentido, algunos estudios han evidenciado que la calidad de los barrios se ve influenciada por las acciones que en él se promuevan, por el conocimiento de la ciudadanía sobre los servicios públicos, por la participación ciudadana o la conectividad del barrio (Berroeta, 2015; Gutiérrez-Rodríguez et al., 2024; Huete, 2012; Jones-Rounds et al., 2014; Moscato, 2014; Ramos-Vidal, 2014; Ríos y Moreno, 2010; Rodrigo, 2010), configurándose estos y demás aspectos comunitarios como factores protectores para el bienestar de las familias que han migrado y elementos clave de apoyo social (Ayón y Ghosn, 2013; Álvarez et al., 2021; Castellano y Hinestroza, 2017; Gutiérrez-Rodríguez et al., 2022). Aunque son múltiples los factores que determinan el desarrollo de la parentalidad y el bienestar de las familias en el nuevo contexto, se ha profundizado poco en los elementos contextuales como factores relevantes para el bienestar de familias que han migrado, lo que es fundamental para elaborar intervenciones a nivel comunitario con el objetivo de facilitar su proceso de adaptación e inclusión social, logrando en un último fin su bienestar familiar y social (Gutiérrez-Rodríguez et al., 2024; Millán-Franco, 2019).

En este sentido, algunos estudios han demostrado como el sentimiento de comunidad favorece comportamientos prosociales, fomenta la participación e interacción relacional y refuerza el compromiso colectivo de los residentes de un lugar, generando así un proceso de revitalización de los barrios (Méndez y Pérez, 2017; Prezza et al., 2001; Sarason, 1974; Sonn, 2002). En el caso de entornos interculturales la negociación cultural y la vinculación emocional con el contexto de acogida que resulta del compartir experiencias comunes, conforman un conjunto determinante en la elaboración del sentido propio de pertenencia a la comunidad y en su adaptación (Millán-Franco, 2019). En este caso, los grupos formales e informales del barrio adquieren un papel crucial (Hernández y Escala, 2021; Sánchez y García, 2001; Santos y Pérez, 2016).

Por todo ello, este estudio es novedoso y pertinente, ya que profundiza en cómo el barrio puede constituirse como un elemento facilitador de inclusión y bienestar parental para las familias latinoamericanas migrantes, desde sus propias voces, promoviendo así la creación de estrategias e intervenciones a nivel familiar, social y comunitario (Cabrera, 2016; Gozávez, 2013; Herrero et al., 2012; Millán-Franco et al., 2024).

Concretamente los objetivos del presente estudio son a) conocer la percepción de la calidad de los barrios desde la visión de profesionales de servicios sociales comunitarios, b) analizar la perspectiva de las familias latinoamericanas sobre la calidad de los barrios en los que residen y, c) contrastar las evidencias que surgen de la información recogida en los dos objetivos anteriores con el fin de comparar ambas perspectivas.

METODOLOGÍA

Diseño

Para el estudio se ha utilizado una metodología de corte cualitativo y cuantitativo. La adecuación del empleo de ambas metodologías se debe a las ventajas que convienen a este

estudio exploratorio, el cual combina la cuantificación de los diferentes ítems sobre la calidad de los barrios analizados a través de un instrumento de probada validez y fiabilidad (Menéndez et al., 2012; Pita y Pertegás, 2002), dando así respuesta a los objetivos uno y tres del estudio. Asimismo, se ha utilizado la metodología cualitativa como herramienta para la comprensión de la realidad planteada por las propias personas que la viven, dando respuesta a los objetivos dos y tres del estudio (Pérez, 2002).

Participantes

La muestra de profesionales se compone de tres diplomados/as en Trabajo Social de los Servicios Sociales Comunitarios, con una media de 25,3 años de experiencia profesional, en tres barrios ubicados en las zonas norte, metropolitana y sur de Tenerife, concretamente aquellos en los que existe una alta densidad de población migrante latinoamericana. El muestreo fue intencional, localizándolos y contactando con ellos/as vía telefónica.

TABLA 1. Datos descriptivos de los y las profesionales encuestados

Zona de Tenerife	Miembro de Servicios Sociales	Tiempo en Servicios Sociales	Años de experiencia como profesional	Estudios superiores	Año de titulación	Estudios de posgrado
Metropolitana	Trabajador social	4	19	Diplomatura en Trabajo Social	2005	Máster Oficial en Trabajo Social, Estado de Bienestar y Metodologías de Intervención
Norte	Trabajadora social	30	30	Diplomatura en Trabajo Social	1996	Ninguno
Sur	Trabajadora social	27	27	Diplomatura en Trabajo Social	1997	Ninguno

En relación con las familias participantes en las entrevistas grupales, se compone de 12 personas migrantes latinoamericanas, 11 mujeres y 1 hombre, residentes en Tenerife con hijos e hijas menores de edad a cargo y usuarias de servicios comunitarios. Para su selección se empleó un muestreo intencional, localizando y contactando con ellos/as vía telefónica a través de una ONG que facilitó la búsqueda de la muestra en tres sedes de diferentes zonas de la isla: norte, metropolitana y sur. Las nacionalidades de las personas participantes eran en su mayoría de Venezuela (n=8), con una media de edad de 39 años y presentaban una media de 6 años residiendo en Tenerife. Respecto a su situación laboral y económica la mitad estaba en situación de desempleo (50%), y presentaban una media de ingresos de 562 euros mensuales.

Tabla 2. Características sociodemográficas de las personas participantes en las entrevistas grupales

ID	País de origen	Género	Edad	Estado civil	Situación laboral	Nº de hijos/as	Edad de los/as hijos/as	Ingresos mensuales	Tipo de vivienda	Personas convivientes	Familiares en Canarias previo al desplazamiento migratorio	Emprendimiento del proyecto familiar	Razones para la migración	Años en Canarias
B1-M	Bolivia	Mujer	39	Casada	Contrato temporal	3	14, 8 y 4	500€-1000€	En propiedad	Marido, hijos e hijas	Sí	En solitario	Motivos económicos	17
V1-M	Venezuela	Mujer	37	Divorciada	Desempleo	1	12	0€-500€	Alquiler compartido con otras personas/familias	Hija y otras familias	No	Con hija a cargo	Mejor futuro de su hija	3
V2-M	Venezuela	Mujer	40	Soltera	Desempleo	2	9 y 2	0€-500€	Alquiler	Pareja, hijos y suegra	Sí	Con pareja, suegra e hijos a cargo	Motivos económicos, motivos políticos e inseguridad, mejor futuro de mis hijos, porque conozco el idioma y por volver con la familia	6 meses
CO1-M	Colombia	Mujer	36	Soltera	Desempleo	3	19, 13 y 7	0€-500€	Alquiler	Hijos e hija	No	Con hijos e hija a cargo	Mejor futuro de mis hijos e hija	5
P1-M	Perú	Mujer	43	Casada	Trabajo sin contrato	1	10	500€-1000€	Alquiler	Marido e hijo	No	Con marido e hijo a cargo	Motivos económicos, motivos políticos e inseguridad y mejor futuro de mi hijo	1
V3-M	Venezuela	Mujer	37	Casada	Empleo	2	9 y 3	500€-1000€	En propiedad	Marido e hijos	Sí	Con marido	Motivos económicos, motivos políticos e inseguridad	11
V4-M	Venezuela	Mujer	35	Soltera	Desempleo	2	17 y 4 meses	0€-500€	Alquiler compartido con otras personas/familias	Hijo e hija y otras familias	No	Con hijo a cargo	Motivos económicos, motivos políticos e inseguridad y mejor futuro de mi hijo	5 meses
U1-M	Uruguay	Mujer	41	Divorciada	Contrato estable	2	17 y 12	1000€-1500€	Alquiler	Hijo e hija	No	Con marido e hija a cargo	Motivos económicos y mejor futuro de mi hijo	15
V5-M	Venezuela	Mujer	39	Soltera	Empleo	1	14	500€-1000€	Alquiler	Hijo	No	Con hijo a cargo	Mejor futuro de mi hijo	6 meses
V6-M	Venezuela	Mujer	36	Divorciada	Desempleo	2	12 y 9	500€-1000€	Alquiler	Hijo e hija	No	Con hijo e hija a cargo	Motivos económicos, motivos políticos e inseguridad, mejor futuro de mi hijo e hija, porque conozco el idioma	5
V7-M	Venezuela	Mujer	41	Casada	Contrato temporal	1	17	1000€-1500€	Alquiler	Marido e hijo	Sí	Con hijo a cargo	Motivos económicos, motivos políticos e inseguridad, mejor futuro de mi hijo y por volver con la familia	17
V8-H	Venezuela	Hombre	45	Casado	Desempleo	4	14, 8, 6 y 3	0€-500€	Cedida	Mujer e hijos e hijas	Sí	Con mujer, hijos e hijas a cargo	Mejor futuro de mis hijos e hijas	10 meses

Técnicas e instrumentos

Para dar respuesta al objetivo uno y tres se empleó, vía telefónica, la Escala para la Evaluación de la Calidad del Vecindario [ECAVE] (Menéndez et al., 2012). Este instrumento validado cuenta con cinco subescalas organizadas en 34 ítems y tiene como fin valorar el nivel de calidad del vecindario a través de la puntuación obtenida de la suma de los ítems de cada subescala y su total, siendo estas: nivel socioeconómico (I), características físicas (II), problemática social (III), servicios comunitarios (IV) y cohesión e integración social (V). A mayor valor obtenido en cada una de las subescalas, mayor nivel de calidad en ese aspecto. La aplicación de este cuestionario a los y las profesionales de Servicios Sociales Comunitarios duró una media de 22 minutos.

Para dar respuesta al objetivo 2 y 3 del estudio se llevaron a cabo tres entrevistas grupales presenciales con un guion de preguntas semiestructurado, organizado de acuerdo con las principales dimensiones de la calidad del barrio señaladas en el ECAVE: nivel socioeconómico (I), características físicas (II), problemática social (III), servicios comunitarios (IV) y cohesión e integración social (V), formulándose a través de preguntas concretas.

Cada entrevista se desarrolló en los diferentes barrios. La entrevista grupal 1, desarrollada en zona norte, estuvo formada por 4 participantes, mientras que la entrevista grupal 2, correspondiente a la zona metropolitana, estuvo conformada por 5 participantes y por último en la entrevista grupal 3, la de la zona sur, fue desarrollada por 3 participantes. El intervalo de duración fue de 45 minutos aproximadamente.

Procedimiento

Con los/as profesionales participantes se acordó previamente la hora para efectuar la llamada, con la finalidad de no interrumpir su jornada de atención al público. Ese día se recogieron algunos datos generales a efectos de identificación y posteriormente se les presentó, a cada uno, los principales objetivos de investigación, se les explicó en qué consistía la participación, cómo se estructuraba el ECAVE y cómo se iba a desarrollar la colaboración.

La localización de las personas participantes para las entrevistas grupales se realizó a través de la colaboración de tres sedes de la misma ONG distribuidas en la zona norte, metropolitana y sur de la isla de Tenerife. Tras esto, se seleccionó una muestra que cumplía con el perfil de requisitos necesarios para el estudio: familia latinoamericana migrante, residente de ese barrio y con hijos e hijas menores a cargo. Luego, vía telefónica se contactó con las personas previamente seleccionadas para presentarles de forma breve los objetivos del estudio e invitándolas a participar en el mismo. De forma paralela, se elaboró el guion de preguntas para la entrevista semiestructurada. Posteriormente, se citó a los/as participantes en un horario y lugar convenido por la mayoría para desarrollar la entrevista grupal. Ese día, tras agradecer su colaboración, se les expuso de forma oral y escrita los objetivos del estudio en desarrollo, asimismo se explicó en cualquier momento podían abandonar la sesión si no se sentían cómodos/as. Una vez prestado su consentimiento, firmando el documento pertinente, procedieron a cumplimentar los datos sociodemográficos. Tras recoger estos documentos, se explicó la estructura de la sesión, se aclararon las dudas planteadas y se dio comienzo a las entrevistas grupales que fueron grabadas con el fin exclusivo de su tratamiento para el estudio. Tras esto se transcribieron las grabaciones y se codificaron las diferentes ideas con el software Atlas Ti.

RESULTADOS

Resultados obtenidos de la percepción de los/as profesionales de servicios sociales comunitarios sobre la calidad de los barrios

Los resultados obtenidos para dar respuesta al objetivo uno se organiza reflejan las respuestas del/la profesional de cada barrio en el ECAVE. Las celdas sombreadas en gris corresponden a aquellos ítems invertidos, indicados en la escala, con la puntuación ya invertida (ver Tablas 3, 4 y 5).

Tabla 3. Resultados del ECAVE en el barrio de zona norte

Puntuación por subescalas	Ítems	Puntuación por ítem
I. Nivel socioeconómico (13)	1. Actividad laboral	3
	2. Economía sumergida	3
	3. Ingresos: cuantía	3
	4. Ingresos: estabilidad	2
	5. Nivel de formación	2
II. Características físicas (14)	6. Amplitud	2
	7. Limpieza	4
	8. Deterioro	4
	9. Apariencia	2
	10. Riesgo para la integridad física	2
III. Problemática social (20)	11. Actividades ilegales	5
	12. Drogas	5
	13. Delincuencia y conducta antisocial	5
	14. Sensación de inseguridad	5
IV. Servicios comunitarios (37)	15. Cantidad	3
	16. Calidad	4
	17. Disponibilidad	3
	18. Demanda y uso	3
	19. Seguridad y vigilancia	4
	20. Salud	5
	21. Necesidades evolutivo-educativas: contextos formales de atención	5
	22. Comercios	4
	23. Transporte público	2
	24. Servicios de empleo y administración pública	4
V. Cohesión e integración social (38)	25. Movilidad e inestabilidad	2
	26. Integración de la diversidad étnica	3
	27. Ayuda mutua	5
	28. Agrupación y movilización vecinal	4
	29. Conflictividad	5
	30. Espacios públicos que propician las relaciones sociales: existencia	3
	31. Espacios públicos que propician las relaciones sociales: empleo	3
	32. Actividades que propician las relaciones sociales: existencia	4
	33. Actividades que propician las relaciones sociales participación	4
	34. Satisfacción	5

Puntuación total: 122

Tabla 4. Resultados del ECAVE en el barrio de zona metropolitana

Puntuación por subescalas	Ítems	Puntuación por ítem
I. Nivel socioeconómico (10)	1. Actividad laboral	4
	2. Economía sumergida	1
	3. Ingresos: cuantía	2
	4. Ingresos: estabilidad	2
	5. Nivel de formación	1
II. Características físicas (12)	6. Amplitud	3
	7. Limpieza	2
	8. Deterioro	2
	9. Apariencia	3
	10. Riesgo para la integridad física	2
III. Problemática social (15)	11. Actividades ilegales	3
	12. Drogas	4
	13. Delincuencia y conducta antisocial	5
	14. Sensación de inseguridad	3
IV. Servicios comunitarios (33)	15. Cantidad	3
	16. Calidad	4
	17. Disponibilidad	4
	18. Demanda y uso	4
	19. Seguridad y vigilancia	2
	20. Salud	4
	21. Necesidades evolutivo-educativas: contextos formales de atención	3
	22. Comercios	3
	23. Transporte público	3
	24. Servicios de empleo y administración pública	3
V. Cohesión e integración social (31)	25. Movilidad e inestabilidad	3
	26. Integración de la diversidad étnica	2
	27. Ayuda mutua	3
	28. Agrupación y movilización vecinal	3
	29. Conflictividad	2
	30. Espacios públicos que propician las relaciones sociales: existencia	5
	31. Espacios públicos que propician las relaciones sociales: empleo	3
	32. Actividades que propician las relaciones sociales: existencia	4
	33. Actividades que propician las relaciones sociales participación	3
	34. Satisfacción	3

Puntuación total: 101

Tabla 5. Resultados del ECAVE en el barrio de zona sur

Puntuación por subescalas	Ítems	Puntuación por ítem
I. Nivel socioeconómico (15)	1. Actividad laboral	4
	2. Economía sumergida	2
	3. Ingresos: cuantía	3
	4. Ingresos: estabilidad	3
	5. Nivel de formación	3
II. Características físicas (20)	6. Amplitud	4
	7. Limpieza	4
	8. Deterioro	4
	9. Apariencia	4
	10. Riesgo para la integridad física	4
III. Problemática social (17)	11. Actividades ilegales	4
	12. Drogas	3
	13. Delincuencia y conducta antisocial	5
	14. Sensación de inseguridad	5
IV. Servicios comunitarios (47)	15. Cantidad	5
	16. Calidad	5
	17. Disponibilidad	4
	18. Demanda y uso	5
	19. Seguridad y vigilancia	5
	20. Salud	5
	21. Necesidades evolutivo-educativas: contextos formales de atención	4
	22. Comercios	5
	23. Transporte público	4
	24. Servicios de empleo y administración pública	5
V. Cohesión e integración social (40)	25. Movilidad e inestabilidad	5
	26. Integración de la diversidad étnica	3
	27. Ayuda mutua	4
	28. Agrupación y movilización vecinal	3
	29. Conflictividad	3
	30. Espacios públicos que propician las relaciones sociales: existencia	4
	31. Espacios públicos que propician las relaciones sociales: empleo	4
	32. Actividades que propician las relaciones sociales: existencia	5
	33. Actividades que propician las relaciones sociales participación	5
	34. Satisfacción	4

Puntuación total: 139

La trabajadora social que desarrolla su actividad profesional en los Servicios Sociales comunitarios del barrio situado en la zona norte valora el contexto de esta comunidad con una puntuación total de 106 en el ECAVE. De este resultado cabe señalar: en cuanto al nivel socioeconómico, la inestabilidad de los ingresos y el bajo nivel educativo generalizado; sobre las características físicas, su percepción satisfactoria con la limpieza y el cuidado del mobiliario público y, sobre la problemática social, refiere una ausencia total de la misma. En materia de servicios comunitarios, señala especialmente la calidad de los servicios de salud, así como la adecuación de la red de servicios a las necesidades evolutivo-educativas en los contextos formales de atención del barrio. En lo que respecta a la cohesión e integración social del barrio destaca la cooperación recíproca de los/las vecinos/as y el imperceptible nivel de conflictividad. Sin embargo, destaca la movilidad de la población residente. Finalmente, la profesional transmite la plena satisfacción con la calidad del barrio.

Desde la percepción del profesional de la zona metropolitana, la calidad del barrio obtiene una puntuación total de 101 en el ECAVE. En primer lugar, con relación al nivel socioeconómico destaca la abundancia de actividades laborales de economía sumergida. En segundo lugar, las puntuaciones medio-altas en las características físicas sugieren una satisfacción general positiva en este aspecto. En lo que respecta a la problemática social, se señala la preocupación por el consumo de drogas y las actividades ilícitas. En cuanto a los servicios comunitarios refiere que se ofrecen y tienen una calidad media-alta. Por último, en relación con la cohesión e integración social se señala la escasez de cooperación entre los/as vecinos/as, pero se refleja el interés notable de las autoridades por desarrollar actividades y generar espacios que propicien relaciones entre sus residentes. De todo ello, resulta una satisfacción general intermedia con la calidad que ofrece el barrio.

Desde el punto de vista de la trabajadora social de la zona sur, la calidad del barrio en análisis resultó con una puntuación total de 139, siendo el más valorado de los tres. En cuanto al nivel socioeconómico, destaca la gran presencia que adquieren las actividades laborales de economía sumergida y el nivel medio de la cuantía y la estabilidad de los ingresos. Sobre las características físicas, la profesional hace un balance notablemente positivo y también destaca la escasez de problemática social en la zona y la sensación de seguridad que se percibe. Con relación a los servicios comunitarios de la zona, la profesional otorga puntuaciones altas de lo que se deduce una oferta variada de servicios. Por otra parte, en lo que concierne a la cohesión e integración social, hace constar la gran movilidad e inestabilidad de los/las residentes así como una gran participación en las actividades que se proponen. Por último, aquellos aspectos menos valorados, pero que no adquirieron una significación negativa, son la integración de la diversidad étnica, la agrupación y movilización vecinal y la conflictividad. Todo esto concluye en una percepción positiva y de satisfacción con el barrio.

Resultados obtenidos de la percepción de las familias latinoamericanas sobre sus barrios

Atendiendo al objetivo dos, analizar la perspectiva de las familias latinoamericanas sobre la calidad de los barrios en los que residen, las respuestas de las familias se han organizado en 4 constructos principales (ver Tablas 6, 7 y 8). Tres de ellos corresponden con las subescalas III, IV y V del ECAVE y, el restante, agrupa otros temas emergentes que surgen de la información transmitida por las propias familias. A su vez, estos constructos se han organizado entre 10 y 13 temas, 15 y 22 subtemas y una media de 161 citas codificadas. Conviene destacar que los constructos mayormente abordados por los/as participantes durante las tres sesiones fueron “*Cohesión e integración social*” y “*Servicios comunitarios*” que alcanzan entre un 74,38% y 90,45% de representación respecto al número total de citas codificadas.

Tabla 6. Frecuencia de citas en relación con la percepción de calidad del barrio de zona norte (en porcentaje)

Constructos principales	Temas	Subtemas	Nº de citas
Cohesión e integración social (50,96%)	Actividades que propician relaciones sociales, existencia y participación (28,66%)	Festividades y ocio en el barrio	45
	Agrupación y movilización vecinal (11,46%)	Percepción sobre la relación vecinal	18
	Satisfacción (6,37%)	Satisfacción con el barrio	8
		Percepción sobre el cambio de barrio	2
	Integración y diversidad étnica (3,18%)	Necesidad de acogida y apoyo para la adaptación en el nuevo barrio	5
	Espacios públicos que propician relaciones sociales: existencia (1,27%)	Necesidad de representación en el barrio	2
Servicios comunitarios (39,49%)	Conectividad y equipación del barrio (16,56%)	Valoración sobre la conectividad	12
		Valoración sobre la equipación	12
		Estrés por tráfico	2
	Necesidades evolutivo-educativas: contextos formales de atención (10,86%)	Escuela	19
		Servicios Sociales	10
		ONGs	7
Temas emergentes (5,10%)	Resiliencia (3,18%)	Valoración de la experiencia migratoria y de adaptación	5
	Conciliación vida personal, familiar y laboral (1,91%)	Necesidad sobre el apoyo para la conciliación	3
Problemática social (4,46%)	Inseguridad en el barrio (4,46%)	Percepción de seguridad en el barrio	7

Tabla 7. Frecuencia de citas en relación con la percepción de calidad del barrio de zona metropolitana (en porcentaje)

Constructos principales	Temas	Subtemas	Nº de citas
Cohesión e integración social (43,75%)	Actividades que propician relaciones sociales, existencia y participación (19,38%)	Festividades y ocio en el barrio	20
		Necesidad de realizar actividades interculturales	11
	Integración y diversidad étnica (10%)	Necesidad de acogida y apoyo para la adaptación en el nuevo contexto	12
		Deseo por conocer el barrio	4
	Agrupación y movilización vecinal (7,5%)	Percepción de la relación vecinal	12
		Percepción sobre el cambio de barrio	5
	Espacios públicos que propician relaciones: existencia (1,25%)	Satisfacción con el barrio	4
		Necesidad representación en el barrio	2
Servicios comunitarios (30,63%)	Necesidades evolutivo-educativas: contextos formales de atención (20%)	Servicios Sociales	15
		Escuela	11
		ONGs	6
	Conectividad y equipación del barrio (8,75%)	Percepción de la equipación	8
		Percepción de la conectividad	6
Temas emergentes (17,50%)	Seguridad y vigilancia (1,88%)	Necesidad de mayor presencia policial en el barrio	3
	Vivienda (8,75%)	Dificultad de acceso a la vivienda	10
		Percepción sobre la calidad de la vivienda	4
	Conciliación vida personal, familiar y laboral (5%)	Necesidad sobre el apoyo para la conciliación	8
Problemática social (8,13%)	Situación administrativa (3,75%)	Percepción de estrés durante el proceso de regularización de su situación administrativa	6
	Conductas antisociales y consumo de drogas (4,38%)	Bullicio nocturno y peleas en el barrio	6
		Consumo de drogas	1
	Inseguridad en el barrio (3,75%)	Percepción de inseguridad en el barrio	3
		Preocupación por el bienestar de sus hijos e hijas	3

Tabla 8. Frecuencia de citas en relación con la percepción de calidad del barrio de zona sur (en porcentaje)

Constructos principales	Temas	Subtemas	Nº de citas
Cohesión e integración social (53,61%)	Actividades que propician relaciones sociales, existencia y participación (30,72%)	Festividades y ocio en el barrio	40
		Necesidad de realizar actividades interculturales	11
	Agrupación y movilización vecinal (8,43%)	Percepción sobre la relación vecinal	14
	Integración y diversidad étnica (6,02%)	Necesidad de acogida y apoyo para la adaptación en el nuevo contexto	10
	Espacios públicos que propician relaciones sociales: existencia (4,22%)	Necesidad de representación en el barrio	7
		Satisfacción con el barrio	7
Servicios comunitarios (30,72%)	Necesidades evolutivo-educativas: contextos formales de atención (22,89%)	Escuela	14
		ONGs	12
		Servicios Sociales	12
	Conectividad y equipación del barrio (5,42%)	Valoración sobre la equipación	8
		Valoración sobre la conectividad	1
Temas emergentes (13,25%)	Salud (2,41%)	Percepción sobre la atención sanitaria	4
	Vivienda (6,63%)	Percepción sobre la calidad de la vivienda	11
	Convivencia intercultural (4,82%)	Percepción sobre la convivencia intercultural	6
		Percepción sobre el apoyo a personas migrantes	2
	Conciliación vida personal, familiar y laboral (1,81%)	Necesidad sobre el apoyo para la conciliación	3
Problemática social (2,41%)	Inseguridad en el barrio (2,41%)	Percepción de la seguridad en el barrio	4

A continuación, cada cita se identifica con el ID de investigación asignado a cada participante en la Tabla 2.

Construtto “*Cohesión e integración social*”

Este constructo engloba 5 temas de los que “*Actividades que propician relaciones sociales, existencia y participación*” ha sido el más comentado, en concreto, el subtema de las festividades y las actividades de ocio en los barrios. Si bien los/las participantes de la zona norte y de la zona sur aluden a su satisfacción con las diferentes actividades de ocio que se desarrollan en sus barrios, destacando su buena difusión y su carácter familiar, en la zona metropolitana tan solo señalan su conocimiento pero no realizan valoraciones sobre su satisfacción con las mismas, de lo que se deduce y también confirman la mitad de las participantes, su escasa participación en ellas. De igual forma emerge, dada la alusión significativa durante las entrevistas de los barrios de las zonas metropolitana y sur, la necesidad de realizar intercambios interculturales en familia junto con los/las residentes autóctonos.

“Yo creo que todos nosotros que venimos de países diferentes... El tratar de hacerlas y tratar de culturizar con españoles también con de repente nuestra cultura o nuestras comidas o bailes o nuestros paisajes...” P1-M, participante de la entrevista grupal 1.

En relación con la agrupación y movilización vecinal, surge una diferencia significativa en el peso de este tema respecto a las citas totales entre los barrios. En todas las sesiones, los/las participantes refieren mayoritariamente la ausencia de relación o contacto cordial con sus vecinos/as exceptuando casos concretos en el que mantienen una relación muy cercana, recíproca y de apoyo mutuo. Los/as participantes residentes en las zonas metropolitana y norte apuntan a las diferencias culturales respecto a las relaciones vecinales con sus países de origen, mientras que las residentes del sur destacan positivamente el contacto vecinal, vía redes sociales, para la difusión de festividades y eventos del barrio.

“A ver que solo tengo 5 meses acá pero percibo que la confianza es como tú tienes tu lugar, yo tengo el mío, nos conocemos y sí pero ahí...” V5-M, participante de la entrevista grupal 3.

Sobre la integración y diversidad étnica, en todas las sesiones se menciona, en mayor o menor medida, el deseo de los/las participantes por conocer el barrio pero aluden a la escasez de acciones de acogida y apoyo para su adaptación, refiriendo la necesidad de algún tipo de atención o acompañamiento en específico a personas migrantes.

“Y conocer, conocer cómo son sus costumbres, sus formas, sus reglas. Eso es totalmente adaptación... Todo eso se aprende” P1-M, participante de la entrevista grupal 1.

Respecto a la satisfacción con el barrio, la mayoría están satisfechas en aspectos generales y manifiestan no querer cambiar de residencia. Específicamente, los/as participantes asentadas en la zona norte de la isla valoran las bondades del mismo para la educar a sus hijos e hijas durante la infancia, mientras que admiten que en las siguientes etapas, adolescencia y adultez, carece de respuestas ante las necesidades evolutivas que sus hijos e hijas manifiestan, lo que conlleva a las familias a plantearse en un futuro el cambio de barrio. En la sesión desarrollada en la zona sur las participantes apuntan a su sentimiento de comunidad que genera su satisfacción con el barrio.

“Porque tengo distintas cosas que puedo hacer con los niños o sea el barrio está bastante completo...O sea yo me siento muy acogida en donde yo vivo de verdad que sí.” V3-M, participante de la entrevista grupal 2.

Por último, en lo que respecta a espacios públicos que propician relaciones sociales, existencia y participación todos/as los/as participantes refieren la necesidad de apoyo a la presencia y representación en el nuevo contexto como mecanismo de inclusión.

“Hombre sería bueno un espacio para intercambiar con otra familias que tuvieran niños pequeños para hacer actividades y para conocer...” P1-M, participante de la entrevista grupal 1.

Construto “Servicios comunitarios”

En lo que concierne a las necesidades evolutivo-educativas: contextos formales de atención comunitarios en el barrio, desde la perspectiva de la mayoría de los/as participantes de la muestra predomina una generalizada crítica negativa sobre los Servicios Sociales centrada en aspectos como su percepción de sobrecarga del servicio que relacionan como causa de la ausencia de apoyo, demora de la atención y las barreras burocráticas dispuestas como puerta de entrada al sistema para las personas migrantes. En relación con otros recursos del barrio como ONGs, Fundaciones o Asociaciones aunque la mayoría manifiestan conocer algunos servicios que se ofrecen y que les proporcionan productos de apoyo para la alimentación, en el caso de las participantes de la zona metropolitana reconocen desconocer de otros recursos mientras que las participantes del sur aluden a un amplio conocimiento de los servicios de atención y refieren su satisfacción con el apoyo que proporcionan. Asimismo, expresan su percepción sobre la escasez de contactos en el barrio y la sensación de lejanía con el Ayuntamiento. En lo que corresponde al papel de la Escuela todos/as los/as participantes hacen constar su plena satisfacción con los diferentes colegios e incluso comparan el nivel educativo con el de su país de origen, refiriendo a la calidad del sistema educativo español y su satisfacción con el mismo. También, los/as participantes de las entrevistas de las zonas metropolitana y del norte apuntan a que su participación en las actividades familiares que proponen los Centros Educativos depende de su horario laboral, lo cual limita su presencia en los mismos. Mientras que la mayoría de las participantes de la entrevista grupal de la zona del sur pertenecen a las Asociaciones de Familias del Alumnado, participan activamente en sus actividades y destacan el seguimiento educativo y la alianza familia-escuela que hace que perciban a la Escuela como un agente cercano. También, destacan su insatisfacción a causa la escasa presencia policial tras alertar de conductas antisociales y aluden a la necesidad de actuación de los cuerpos de seguridad.

“No me he involucrado del todo en el barrio, de verdad, en general. Porque a lo mejor no tengo esos contactos... como mira estoy aquí. No lo siento tan cercano el yo poder dirigirme al Ayuntamiento y decir mira... No lo noto tan cercano a mí o no tengo la confianza suficiente no sé...” V3-M, participante de la entrevista grupal 2.

En referencia a la conectividad y equipación del barrio, las participantes de las entrevistas grupales de las zonas metropolitana y del sur, en su mayoría, expresaron su satisfacción con las redes de servicios básicos e instalaciones urbanas, así como con el sistema de transporte público, su frecuencia y ubicación. Si bien, desde la zona norte se aludió a la disparidad de estos servicios de acuerdo con lo céntrica que fuera cada residencia, generando una sensación de insatisfacción generalizada, se valoró también el estrés por tráfico a causa del movimiento que supone vivir en áreas rurales y desarrollar su actividad profesional en otros lugares de la isla y también demandan la necesidad de enriquecer sus instalaciones.

“Porque yo viendo que mi hijo se va acercando ya al bachillerato y después yo sé que él quiere estudiar en la Universidad, eso es lo que él aspira. Porque me dice no claro mamá yo quiero sacarme una carrera. Y claro el transporte desde XXXX quieras o no en la mañana para tu llegar a la Universidad de La Laguna eso es 2 horas por el tráfico...” V6-M, participante de la entrevista grupal 3.

Por último, destacar que durante la sesión de la entrevista grupal que desarrollaron las participantes residentes en la zona sur emergió el subtema de la atención sanitaria centrada en la escasez de apoyo psicológico ofertado en el barrio tras la creciente demanda social. También hicieron hincapié en la demora de este tipo de atención.

“...Conozco personas muy cercanas a mí que han necesitado ayuda psicológica, de verdad, y que no se la han prestado a tiempo y han sido muy afectadas, en esa parte creo que hay una carencia enorme...” V3-M, participante de la entrevista grupal 2.

Constructo “*Temas emergentes*”

Los temas emergentes derivan de la perspectiva de los/as participantes desde su condición como migrantes latinoamericanos/as. Entre ellos surge la vivienda en relación con las barreras para la regularización de su situación administrativa, los elevados precios y el estrés económico que ello genera y la mejorable calidad del estado de las viviendas en las que residen. También destacan la escasez de apoyo para conciliar su actividad laboral con la vida personal y familiar, haciendo alusión a sus limitaciones en la participación de festividades propuestas desde la escuela y otras actividades de ocio. En el barrio de la zona sur hacen referencia a los aspectos negativos que conlleva la convivencia intercultural, por último, de la zona norte refieren el proceso de adaptación y su estancia en la isla como un aprendizaje que ha generado un enriquecimiento personal inspirando un futuro diferente al que se habían imaginado.

“En nuestro caso para entrar nos piden nómina, y cuando no es nómina tiene que ser legal, bajo la legalidad de que estás trabajando en España y aún así nos falta, en ese proceso nos faltan los papeles entonces... Y eso que tengo un año acá” P1-M, participante de la entrevista grupal 1.

Constructo “*Problemática social*”

En lo que corresponde a este constructo, las participantes de la entrevista grupal de la zona metropolitana tratan temas como las conductas antisociales y el consumo de drogas, la inseguridad percibida en el barrio y la presencia policial, manifestando su insatisfacción con las reyertas, el bullicio nocturno junto al consumo de drogas en zonas infantiles próximas a las viviendas. Señalan como causa sensación de inseguridad y genera preocupación especialmente por el bienestar de sus hijos e hijas, lo que puntualmente también se aborda en la sesión de la zona sur. También, destacan su insatisfacción con la escasa presencia policial tras alertar de los hechos señalados y por tanto aluden a la necesidad de actuación de los cuerpos de seguridad. Asimismo, la muestra señala como en sus países de origen percibían esa inseguridad en mayor medida y que se encuentran, generalmente, satisfechas con la percepción de seguridad que perciben.

“Acá nos sentimos tranquilos, nos sentimos bien y eso es lo importante... Que ellos sientan que se pueden desarrollar tanto como puedan ser a nivel educativo, cultural y de persona.” V5-M, participante de la entrevista grupal 3.

Resultados del contraste de las perspectivas de los y las profesionales comunitarios y las familias latinoamericanas sobre la calidad de los barrios

A continuación, se presenta el análisis para dar respuesta al objetivo tres del estudio. En este se ordenan las subescalas e ítems del ECAVE y su convergencia con las evidencias que surgen de las entrevistas grupales a las familias. Mientras que “*Servicios comunitarios*” y “*Cohesión e integración social*” son las subescalas que presentan mayor coincidencias en relación con los temas abordados en las sesiones, “*Nivel socioeconómico*” y “*Características físicas*” no figuran como temas afines. Asimismo, en la última fila se exponen aquellos temas que se consideran relevantes por su ocurrencia en las sesiones. Excepto la conciliación de la vida personal, familiar y laboral, el resto varían dependiendo de la zona de la isla en la que se ubique el barrio (ver Tabla 9).

Tabla 9. Tabla de convergencia entre los ítems del ECAVE y los temas abordados en las entrevistas grupales de cada barrio

Subescalas del ECAVE	Ítems	Barrios ubicados en Tenerife		
		Zona metropolitana	Zona sur	Zona norte
I. Nivel socioeconómico				
II. Características físicas				
III. Problemática social	11. Actividades ilegales	x		
	12. Drogas	x		
	13. Delincuencia y conducta antisocial	x		
	14. Sensación de inseguridad	x	x	x
IV. Servicios comunitarios	16. Calidad	x	x	x
	17. Disponibilidad	x	x	x
	18. Demanda y uso	x	x	x
	19. Seguridad y vigilancia	x		
	20. Salud		x	
	21. Necesidades evolutivo-educativas: contextos formales de atención	x	x	x
	22. Comercios	x	x	x
	23. Transporte público	x	x	x
	24. Servicios de empleo y administración pública	x	x	x
V. Cohesión e integración social	25. Movilidad e inestabilidad			
	26. Integración a la diversidad étnica	x	x	x
	27. Ayuda mutua	x	x	x
	28. Agrupación y movilización vecinal	x	x	x
	29. Conflictividad			
	30. Espacios públicos: que propician las relaciones sociales: existencia	x	x	x
	31. Espacios públicos que propician las relaciones sociales: empleo			
	32. Actividades que propician las relaciones sociales: existencia	x	x	x

Tabla 9. CONTINUACIÓN

Subescalas del ECAVE	Ítems	Barrios ubicados en Tenerife		
		Zona metropolitana	Zona sur	Zona norte
Temas emergentes derivados de la percepción de las familias latinoamericanas	33. Actividades que propician las relaciones sociales: participación	x	x	x
	34. Satisfacción	x	x	x
	Vivienda	x	x	
	Situación administrativa	x		
	Convivencia intercultural		x	
	Resiliencia			x
	Conciliación vida personal, familiar y laboral	x	x	x

DISCUSIÓN

El presente estudio se centra en conocer y divulgar la relevancia del barrio desde la óptica de profesionales del Trabajo Social y familias migrantes latinoamericanas residentes en diferentes barrios de Tenerife, como fuente de evidencia sobre la importancia del barrio para la adaptación de las personas migrantes en un contexto afín como es Canarias.

En respuesta al objetivo uno de este estudio, la cohesión e integración social y los Servicios comunitarios se constituyen como los principales elementos diferenciales en la calidad de los barrios en análisis, debido a que sus puntuaciones en el ECAVE reflejan la situación heterogénea de las zonas de la isla respecto a este tema de acuerdo con la visión que aportan los y las profesionales de zona. De esta manera, se evidencia la influencia del sentido de comunidad, la participación social, la cooperación vecinal y los servicios ofertados en la calidad que perciben los agentes acerca de una determinada zona, tal y como ya proponían Prezza et al. (2001), Sarason (1974) y Sonn (2002). Si bien a nivel internacional, nacional y autonómico se han desarrollado estrategias para la inclusión y una buena convivencia intercultural, aún desde los ámbitos locales deben seguir desarrollándose iniciativas para mejorar la inclusión de la ciudadanía (Gobierno de Canarias, 2024; OIM, 2024a; OIM, 2024b).

Respecto al objetivo dos, la sistematización de la información que emana de la percepción de las familias latinoamericanas migrantes en relación a la calidad de su barrio afianza la importancia del papel de la comunidad en su adaptación tal y como apuntan otros estudios en España (Gutiérrez-Rodríguez et al., 2023,2024). Las familias participantes analizan la calidad desde una óptica familiar en la que todas las preguntas de la entrevista grupal fueron abordadas teniendo en cuenta la implicación que tienen las características de la zona en el desarrollo de sus tareas parentales y en la crianza de sus hijos e hijas, especialmente las festividades y el ocio, la seguridad, la equipación y la conectividad y la escuela, recogidos como aspectos importantes en el ejercicio de la parentalidad de las familias (Suárez et al., 2016; Rodrigo et al., 2015). Asimismo, se destacó la escasez de apoyo social en el nuevo contexto, haciendo referencia al sistema de apoyo informal, manifestando su necesidad de conciliación para la vida laboral, personal y familiar. Si bien la red de apoyo informal, como elemento fundamental del sistema de apoyo, adquiere unas funciones determinantes que reportan

a las familias numerosos beneficios, este estudio enfatiza el papel que juega el apoyo formal dada la escasez del informal (Álvarez et al., 2021). Por ello, la percepción que manifiestan las familias sobre los agentes del exosistema, en el que están inmersas, confirman la relevancia que adquiere la esfera comunitaria puesto que, las carencias de las múltiples áreas que operan en el barrio, están siendo referidas como determinantes en el desarrollo de su proyecto familiar (Bronfenbrenner y Morris, 2006; Gutiérrez-Rodríguez et al., 2023b; Gutiérrez-Rodríguez, 2024; Rodrigo et al., 2010). En la misma línea, el beneficio que supone contar con el análisis de tres barrios pertenecientes a diferentes zonas de la isla permite confirmar este hecho puesto que, si bien la muestra presenta variaciones en cuanto a factores de resiliencia y vulnerabilidad propios de la esfera microsisémica, la composición sólida y generalizada sobre la calidad de cada barrio y las diferencias entre los tres reflejan la variabilidad de los diferentes exosistemas en los que las familias están integradas (Bronfenbrenner y Morris, 2006). En la línea de lo anterior, se refleja su influencia en mayor o menor medida, sobre el bienestar de estas familias en Tenerife desde el enfoque del Modelo Multidimensional, en el que la balanza entre todos estos factores puede definir las transiciones evolutivas de todos los miembros de la familia y consecuentemente, más si cabe, en el caso de familias migrantes, su integración social y bienestar (Rodrigo et al., 2008).

En lo que respecta al objetivo tres los beneficios que resultan de la comparación de las percepciones de los y las trabajadoras sociales con las de las familias permite considerar esta realidad desde las visiones de todos los agentes que están implicados en el barrio, lo que supone un enriquecimiento en su análisis. Si bien se ha contado con un instrumento estandarizado, también se recoge la parte cualitativa emergente, que complementa este estudio. En este sentido, la convergencia entre ambas perspectivas prueba, una vez más, la validez de este instrumento para medir la calidad de un vecindario (Menéndez et al., 2012).

Sin embargo, los temas emergentes que surgen de las entrevistas grupales con las familias latinoamericanas participantes muestran las diferencias existentes entre la diversidad de composiciones familiares en un contexto, confirmando que son los factores del nuevo entorno los que pueden ser factores de protección o riesgo para las familias migrantes latinas en Canarias (Gutiérrez-Rodríguez et al., 2023). Esto implica que las percepciones de las familias sobre su comunidad se verán condicionadas por las atribuciones que genera emprender, en este caso, un proyecto migratorio. Por ello, recoger su visión, facilitar entornos que favorezcan su presencia en el barrio, adquirir representación e iniciativas en la elaboración de políticas locales no solo contribuye de forma positiva en la elaboración de su identidad como personas migrantes en el nuevo contexto, sino que también optimizan su calidad de vida y satisfacción vital. Consecuentemente, aumentan los niveles de calidad y generan una influencia recíproca de calidad comunitaria (Diener et al., 1985; García-Cid et al., 2020; Gutiérrez-Rodríguez et al., 2022; Mahmoudi, 2016; Millán-Franco, 2019; Moscato et al., 2014; Pavot et al., 1991; Permentier et al., 2011).

Limitaciones del estudio

Pese a que este estudio ha seguido los procesos metodológicos adecuados, se considera procedente señalar algunos aspectos a tener en cuenta. En primer lugar, dada la dificultad para concertar las entrevistas grupales con padres, ha sido escasa la presencia de hombres en la muestra conformada por las familias migrantes. Es por ello, que este aspecto puede haber sesgado la información registrada para el análisis. También, la elección de tres barrios, uno de cada zona, puede haber afectado a los resultados del estudio puesto que, dada la heterogeneidad de sus características, un análisis integral

de la temática habría exigido un abordaje más amplio, con más barrios de cada zona o bien en más zonas de la isla, que pudiera completar resultados más generalizables.

Líneas de investigación futura

Dado los resultados obtenidos se evidencian algunas líneas de investigación futura a diferentes niveles.

En primer lugar, a nivel de investigación, es necesario seguir en la línea del presente estudio, analizando desde una visión ecosistémica, cómo los factores contextuales tales como el barrio tienen influencia en el bienestar familiar y social de las familias migrantes. Asimismo, sería conveniente el diseño de escalas específicas adaptadas y validadas para población migrante que resida en España.

Por otro lado, en cuanto a las implicaciones para la intervención profesional, el Trabajo Social juega un papel fundamental en la promoción del bienestar social especialmente en contextos de diversidad cultural como es Tenerife. De esta forma, el trabajo social comunitario se convierte en el enlace esencial que facilita la integración y adaptación de estas familias. Por ello, la identificación de necesidades y la promoción de la participación comunitaria por parte de los y las profesionales de esta disciplina se debe seguir considerando un reto de adaptación continua. Asimismo, es importante formación específica en materia cultural para los/as trabajadores/as sociales, siendo necesario el desarrollo de competencias culturales en pro de facilitar y promover el bienestar de las familias migrantes en el nuevo contexto, siendo relevante y significativo la creación de redes comunitarias y nuevos vínculos en el entorno.

Por último, para la elaboración de políticas sociales, es pertinente realizar análisis integrales sobre la relevancia de las comunidades para la adaptación de personas migrantes. Ello servirá de punto de partida en la articulación de medidas que causen impacto positivo en el desarrollo local. Para ello, sería importante que los planes de inclusión social recogieran líneas específicas para la promoción de la parentalidad de las familias migrantes incidiendo en aspectos clave como es la comunidad.

En definitiva, analizar la importancia y el papel que adquiere el barrio en la adaptación de familias migrantes latinoamericanas en Canarias es determinante para su bienestar y el de toda la comunidad. Por este motivo resulta trascendental tener en consideración la percepción de todos los agentes que la conforman, con el fin último de garantizar el bienestar de padres y madres migrantes y el de los niños y las niñas, conformando todo esto comunidad más inclusivas.

CONCLUSIONES

Los resultados del presente estudio orientan sobre la transcendencia del barrio en la inclusión social de familias migrantes latinoamericanas en Tenerife. Las áreas de trabajo detectadas, por su acusada relevancia durante las entrevistas grupales, la variación entre las percepciones de los y las profesionales de cada una y, también siendo las subescalas con mayor convergencia entre ambas perspectivas, son la cohesión e integración social y los servicios comunitarios.

En relación con la cohesión e integración social, las familias participantes destacan la necesidad de adquirir una mayor representación y espacios para realizar actividades de carácter intercultural con otras familias, tanto autóctonas como migrantes. También aluden a la necesidad de fortalecer las redes vecinales y contar con servicios que apoyen sus necesidades y enfatizan en la falta de apoyo al inicio de su asentamiento en el barrio. Es por ello que, fomentar la participación comunitaria a

través de la oferta de actividades de ocio familiar y de intercambio cultural que permitirá proyectar un sentido de comunidad en la localidad que fortalecerá los sistemas de apoyo informal.

Por otro lado, en lo que respecta a los servicios comunitarios la consolidación de estos recursos como fuente cercana y capaz de generar un apoyo adecuado a las necesidades de adaptación, así como establecerse como una puerta de entrada flexible respecto al proceso de regularización de la situación administrativa, fomentar sistemas de apoyo para el mismo, atender y gestionar a la población solicitante se establece como objetivo respecto a la mejora para la calidad de los barrios, que repercuten directamente en el bienestar de toda la comunidad. Debido a la alta satisfacción con la escuela, esta podría jugar un papel fundamental para la creación de redes informales en la zona y como acogedora para albergar iniciativas de actividades familiar y transcultural.

Por último, destacar los temas emergentes que aún no siendo de los más abordados, su presencia en las intervenciones de los/las participantes revelan la singularidad de la vivencia desde las propias voces de quienes viven esta realidad. Desde la política local y a través de los servicios comunitarios se debe abordar la gestión de la convivencia intercultural, se deben establecer mecanismos de apoyo para el acceso la vivienda y para la conciliación de la vida personal, laboral y familiar, permitiendo que tanto los/as padres y madres acudan a las actividades que se proponen desde cualquier organismo, puesto que de ello depende su satisfacción vital, su sentido de comunidad, su percepción sobre la calidad y el bienestar de la zona.

En definitiva, la relevancia del barrio en el proceso de adaptación de las familias latinoamericanas en Tenerife es innegable y, a pesar de la afinidad histórica, cultural, lingüística y gastronómica aún queda por demostrar la proximidad y confraternización en la actualidad con toda la población que se desplaza al archipiélago. Por ello, la intervención comunitaria en las localidades siguiendo las estrategias mundiales, nacionales y autonómicas se constituye como un reto que debe abordarse con un empeño de recursos humanos y económico. La realidad migratoria debe gestionarse para optimizar una saludable convivencia intercultural.

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ARTÍCULO DE INVESTIGACIÓN

La transformación del papel de la familia en el espacio sociocultural moderno

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Resumen. Se describe la evolución de la percepción de los valores familiares entre la juventud moderna en el espacio sociocultural. Examina cómo las influencias sociales contemporáneas, incluida la educación secular y la cultura consumista, afectan las actitudes hacia la formación de la familia, sus funciones y responsabilidades. Se empleó un método de investigación empírica mediante una encuesta en línea distribuida a 380 estudiantes de la Universidad Politécnica de Moscú. Se estructuró en tres bloques temáticos: (1) comprensión conceptual de la familia y orientaciones de valores, (2) situaciones familiares individuales de los encuestados, y (3) tradiciones familiares y actitudes hacia el divorcio. Los resultados revelan que, a pesar de las tendencias individualistas y consumistas dominantes, el 82,6% de los encuestados sigue considerando la formación de la familia un objetivo vital central. La percepción de la estructura familiar ha cambiado, y sólo el 69,8% afirma la necesidad de un hogar biparental. Un porcentaje notable da prioridad a la carrera profesional y a la realización personal antes que, al matrimonio temprano, y muchos retrasan la formación de una familia hasta una edad más avanzada. El estudio subraya la preocupación por el aumento de las

tasas de divorcio, citando como causas principales la falta de entendimiento mutuo (73,6%) y la infidelidad (11,5%). Los resultados permiten una comprensión amplia de la dinámica familiar y de los retos a los que se enfrenta la cohesión social, aporta ideas relevantes para el trabajo social y los estudios interdisciplinarios sobre la estabilidad familiar y la preservación de los valores.

Palabras clave: transformación familiar, percepción juvenil, valores familiares, espacio sociocultural, autorrealización.

The transformation of family role in the modern socio-cultural space

Abstract. The evolution of the perception of family values among modern youth in the sociocultural space is described. It examines how contemporary social influences, including secular education and consumerist culture, affect attitudes toward family formation, its functions, and responsibilities. An empirical research method was employed through an online survey distributed to 380 students from Moscow Polytechnic University. It was structured into three thematic blocks: (1) conceptual understanding of the family and value orientations, (2) individual family situations of the respondents, and (3) family traditions and attitudes toward divorce. The results reveal that, despite dominant individualistic and consumerist trends, 82.6% of respondents still consider family formation a central life goal. The perception of family structure has changed, and only 69.8% affirm the need for a two-parent household. A notable percentage prioritizes professional careers and personal fulfillment over early marriage, and many delay family formation until a later age. The study highlights concern about rising divorce rates, citing lack of mutual understanding (73.6%) and infidelity (11.5%) as the main causes. The results allow for a broad understanding of family dynamics and the challenges facing social cohesion, providing relevant insights for social work and interdisciplinary studies on family stability and the preservation of values.

Key words: family transformation, youth perception, family values, socio-cultural space, self-realization.

INTRODUCTION

The main issue raised in this paper is the question of how the concept of family remains a traditional value in modern society. The understanding of what family is and what role it plays in a person's life has significantly changed in recent years under the influence of society, culture, and education. It is known that in Christian culture, the family is an important traditional value, as it serves as a foundation not only in the material world but also in the spiritual realm. In this article, the authors analyze how seriously modern youth approach the idea of starting a family, as well as how contemporary society understands the concept of "family."

In the study, the authors relied on works from contemporary scientific literature, as they thoroughly examine the role of Christianity in the upbringing of family values (Kozyrev, 2008; Sushkova, 2013; Zerkina, 2023), the importance of preserving traditions in the family as a factor in raising the next generation (Kulakovskaya-Dyakonova, 2016; Mindibekova, 2016; Gvozd & Semkina, 2021). Many researchers consider the family in the context of spiritual values and traditions (Khasbulatova & Isakieva, 2012; Pashkova, 2017; Abdullaeva & Baytazieva, 2020). There is a large number of studies in the field of ethnography (Afanasyeva, 2005; Krechetova, 2020; Saifutdinova & Syraeva, 2021; Smolyakova, 2021). In modern science, in the fields of pedagogy, psychology, and sociology, there is an increasing number of articles that raise and discuss the issues that contemporary families face. Scholars reflect on how much the institution of family has been deformed in the modern world (Popkova, 2013; Eromasova, 2016; Smolik, 2016; Lyubavina & Belova, 2020; Kabanova, 2024).

The purpose of the article was to identify the problems that are destroying the family, as people in modern society are often unable to find the right solutions when facing them, since traditional views, which were created and cultivated over centuries under the influence of religious culture, have undergone certain transformations. A significant role in this has been played by the decline of morals in the modern consumer society and individualism.

METHODS

The primary research method was an online survey, which involved students from the Moscow Polytechnic University. The study included 380 respondents from the 1st, 2nd, 3rd, and 4th years.

The respondents were presented with questions offering multiple-choice answers (both multiple and limited options), as well as open-ended questions. The anonymous questionnaire was conducted remotely using the Google Forms platform, with a standardized questionnaire format. After the survey was posted on Google Forms, students received a link through which each student could complete the survey individually and anonymously. The quantitative data was processed using standard mathematical and statistical analysis methods. The initial data was processed using Microsoft Excel.

The survey consisted of three blocks, all centered around the theme of “family.” The first block contained questions about the concept of family, as well as the value orientations of modern youth. These questions included: What does an ideal family look like? Do you think that a family should be complete? At what age would you like to start a family? How many children should ideally be in a family under current living conditions?

The second block of the survey focused on the individual family situation of the students at the Moscow Polytechnic University. These questions were directly related to each respondent’s specific family situation: In what kind of family did you grow up? What type of family does your family belong to? Would you like to create a family similar to your own?

The third block dealt with leisure time and family activities, family traditions, and issues related to divorce. It raised questions such as: How important is it for you to maintain family ties? How often do you spend time with your family? Are there traditions in your family? What are the reasons for divorces?

Thus, while the first block focuses on the value orientations of modern youth, the second block investigates the factors that shaped these values. The third block aims to uncover the psychological atmosphere in the family where the respondent was raised, which in turn helps to identify the outcomes of modern youth upbringing and the reasons behind the high number of divorces in contemporary society.

RESULTS

Traditional family values are closely tied to religious upbringing. For instance, in Orthodox teaching, family values play a significant role and are deeply rooted in traditional beliefs. The creation of a family plays an important role in shaping a person's spiritual world; it is not an end in itself but a means to achieve well-being and salvation. The family is the environment that shapes a person's inner state.

One of the fundamental values is love and respect within the family. Orthodox Christianity teaches mutual support, compassion, and acceptance of one another within the family circle. There must be a hierarchy within the family for it to be considered complete and harmonious (Lykova et al., 2023).

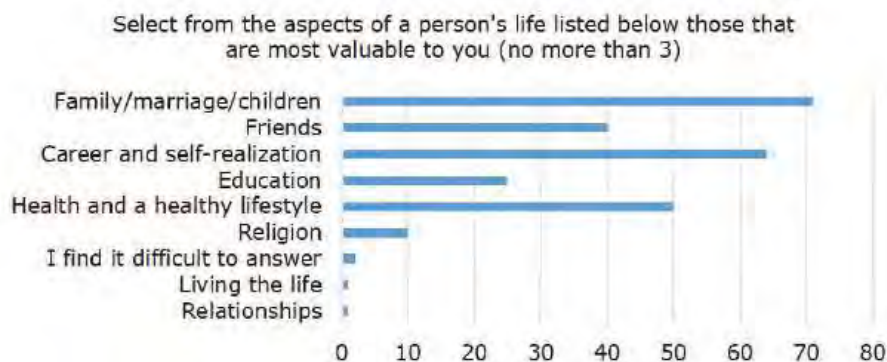
From the perspective of Orthodoxy, special attention should be paid to the upbringing of children. Parents should serve as role models for their children, raising them in an atmosphere of faith, love, and mutual respect. They must be the first mentors and teachers to their children in understanding Christian and worldly values. The family is the social unit where a new individual's development takes place. The process of socialization, which is so important, begins in the family and largely determines the child's spiritual and mental health.

Furthermore, family traditions such as common gatherings, celebrating Christian holidays together, and participating in church rituals also play an important role in forming a sense of community and strengthening family bonds (Agre et al., 2023).

Thus, family values in Orthodox Christianity represent a comprehensive approach to strengthening family relationships based on love, faith, and respect for loved ones.

This is why we were interested in how the concept and perception of family has changed in modern society.

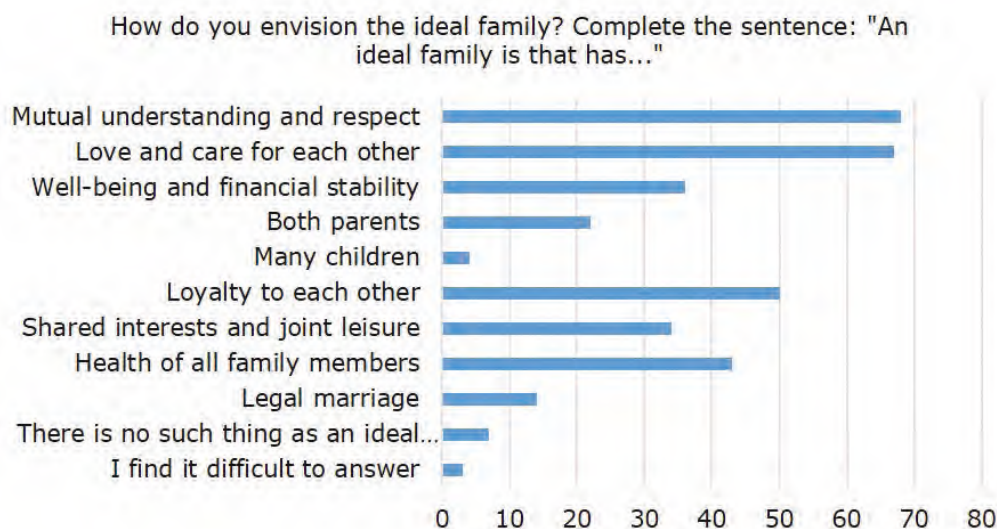
The analysis of the survey results from students at Moscow Polytechnic University shows that the students believe the institution of the family is one of the most important traditional values that must be defended and preserved from destruction in the modern world. The majority of respondents consider starting a family to be one of the main goals of their life (Figure 1).

Figure 1. Main goals of life

Even though consumerism is currently the dominant value in modern society, with the principle of individual consumption of material goods increasingly encompassing the rapidly developing trends of the modern world, a significant portion of the youth surveyed still views starting a family as one of the fundamental parts of human life (82.6%). However, career and self-realization are also important to the respondents (74.4%).

Health and a healthy lifestyle rank third in popularity, which is undoubtedly linked to the growing trend of promoting a healthy lifestyle and self-care. For half of the respondents, friends are considered an important aspect of life (46.5%), and for a third, education is crucial (29.1%).

It is noteworthy that religion is ranked fifth, indicating the secular nature of society, which is primarily influenced by atheistic upbringing.

Figure 2. The youth's perception of family

In order to understand what modern youth consider to be most important in family relationships, they were asked what, in their opinion, lies behind the concept of an "ideal family" (Mokhov et al., 2024). According to the survey results, approximately 80% of respondents believe that mutual understanding, respect, love, and care for one another define an ideal family. Nearly half of the res-

pondents think that the loyalty of partners and the health of all family members are crucial to the idea of an ideal family. For 41.9% of respondents, well-being and financial stability are considered key, and only 25.6% believe that having both parents is essential, while 16.3% view legal marriage as important, which suggests that, for them, marriage is merely a formality and not a necessity for creating a family.

Nowadays, almost everyone has encountered the concept of a “single-parent family.” In the modern world, a single-parent family is becoming the norm for the younger generation. However, 69.8% of respondents believe that a family should have two parents.

Figure 3. The importanec of full-fledge family

Do you think the family should be full-fledged?



In the past century, most people used to start their families at an early age (18-23 years), but the situation is somewhat different now. Only 9.3% of young people are ready for early marriage, while 52.3% and 27.9% plan to marry at a more mature age (23-27 years and 28-35 years, respectively). This is likely due to the desire of respondents to first become a complete person, get an education, build a career, and only then think about starting a family (Figure 4).

Figure 4. Age to start a family

At what age would you like to start a family (get married)?



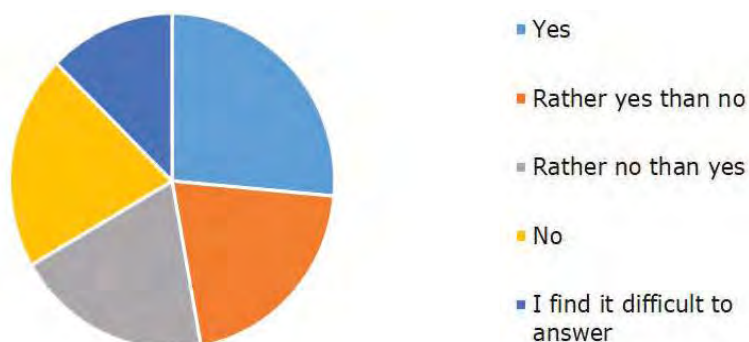
It is also noteworthy that 8.1% of the respondents do not plan to start their own families at all. Regarding children, 9.2% of respondents believe there should be one child in a family, 43.7% believe there should be two, 11.5% think three or four children is ideal, and 18.3% feel that having children is not necessary or that, under current conditions, not having children is the best option. Additionally, 16% of respondents found it difficult to answer and stated that the number of children depends entirely on the family's financial situation.

To understand the reason behind this phenomenon, we asked a slightly different question, creating ideal socio-economic conditions. In this scenario, the number of respondents supporting the idea of having more than three children in a family significantly increased (from 11.5% to 34.4%). This suggests that the respondents would like to have larger families, but due to the current social, political, and economic issues in the country, the younger generation is afraid of difficulties, trials, and does not want to face financial problems. They aspire to a more comfortable life.

The next block of the survey aimed to reveal the individual situations in the families of the respondents. Based on the collected data, the respondents can be divided into three categories: 68.6% grew up in complete families, 24.4% in single-parent families, and 6% experienced both types of families at different times. This situation shows that one-third of the respondents grew up in single-parent or partially complete families. No matter how much parents in incomplete families try to give their children as much love and care as possible, the child will still grow up differently from their peers from complete families. At the level of world perception, they will realize that something is different in their family compared to others, and there are no positive aspects in their family that others consider normal. All of this, directly or indirectly, affects the future and mental health of the child. The child does not learn the norms of behavior for men and women in complete families, does not understand the responsibilities of men and women, and does not have a full understanding of male and female psychology and gender differences. Girls often take on male responsibilities, showing assertiveness and excellent business skills, striving to become the head of the family, while boys become strongly attached to their mothers, who continue to influence their sons even in adulthood, even when they start their own families.

Regarding the type of family: 18.4% belong to traditional families where the husband is the head, 55.2% to egalitarian families (husband and wife are equal), of which half are nuclear families and half are extended families. It is also worth noting that half of the families are small, 28.7% are large families, and the remaining part refrained from answering.

Figure 5. Would you like to have the same family for yourself as the one you grew up in?



This question revealed that 40.2% of respondents would not want to create a family similar to the one they grow up in, while 47.1% would like to have a similar family. 12.6% of respondents were unsure about their answer. These figures suggest that there are still some issues regarding relationships within families. However, despite these concerns, half of the respondents would still like to have families like their own.

The third block of the survey focused on leisure and time spent within families. It should be noted that many students from the Moscow Polytechnic University live in other cities and become quite distant from their families during their studies. However, the students' childhood and adolescence, as well as their formative years, were spent with their families, which undoubtedly influenced the worldview of the respondents.

According to the research, not all respondents consider maintaining family ties an essential part of any family. Among those surveyed, only 67.8% stated that it is important to them. The remaining respondents either disagreed with this view or were uncertain about it. These results confirm the fact that the family dynamics in modern society have changed significantly.

Among those who frequently spend time with their families, 64.3% reported doing so. The remaining 35% prefer to spend time with friends or acquaintances rather than with family. This situation largely defines the individualistic mindset of young people. Family ties are weakening under the influence of modern trends. Categories such as career, success, social connections, and money are becoming more important and valuable than familial bonds and traditions.

Another important aspect is how respondents spend their leisure time with their relatives. According to the survey, the majority are content with simple activities such as spending time together as the family, watching TV, or having conversations (77%), trips to the countryside (34.5%), doing household chores (43.7%), going shopping (43.7%), or meeting with relatives (43.7%). Some attend cultural events together (16.1%), but there are also those who do not spend time together at all (12.6%). In any case, the majority of respondents make an effort to spend time together. It is worth noting that this time spent together mostly revolves around living together and daily household activities, while cultural and religious events represent a small percentage of the total time spent (Figure 6).

Figure 6. Spending time with family

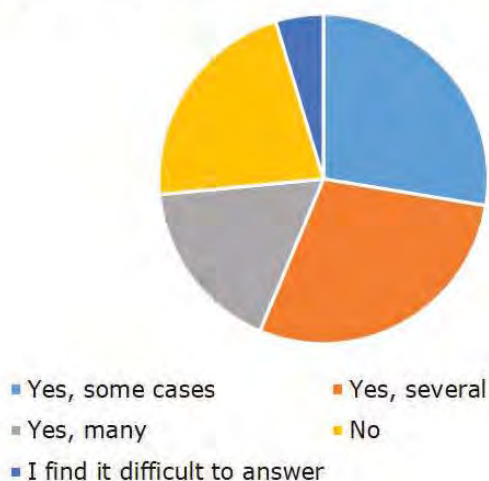


The next block of questions focused on the preservation of the family. Education seems to be an important factor in the strength of family bonds for 51.7% of young people, while it does not play a role for 48.3%. This fact suggests that most respondents believe that having an education for both partners can contribute to the formation of a strong family. This undoubtedly affects the quality of life, income, and financial stability of the family.

Another issue facing modern society is divorce. According to the survey, only one in five respondents has never encountered a case of divorce (Figure 7). The rest, to varying degrees, have witnessed this phenomenon, with 45.9% having experienced it multiple times (Kirillova et al., 2025).

Figure 7. Divorce frequency

Do you have any relatives/friends who are divorced?



Almost all respondents acknowledge that divorce impacts the emotional and psychological state of a child. Only 9.2% hold a different opinion.

The main reason for divorce, according to respondents, is a lack of mutual understanding (73.6%) and infidelity (11.5%). Other reasons mentioned include addiction (4.6%), financial problems (1.1%), and so on.

Thus, it can be concluded that today, issues related to the institution of the family are highly pressing. The problems of demographic decline and divorce have a significant impact on both the social and cultural landscape of individuals and humanity.

CONCLUSION

This study highlights the evolving concept of family in modern society, particularly among youth. Despite the growing influence of consumerism and individualism, which emphasize personal achievement and material success, the traditional family unit remains an essential aspiration for a significant portion of young people.

The research also reveals a shift in family formation patterns, with many respondents opting to delay marriage and children in favor of career and self-realization. This reflects broader socio-

economic pressures and the desire to achieve personal stability before starting a family. Furthermore, concerns over divorce are prevalent, with respondents citing mutual understanding and infidelity as key reasons behind family breakdowns.

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ARTÍCULO DE INVESTIGACIÓN

El significado cultural y social de los rituales maternos en la formación de la identidad kirguís

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Resumen. La poesía kirguís dedicada a los niños, en particular las canciones de cuna, tiene un profundo significado cultural y espiritual. En estas canciones de cuna es fundamental la veneración por Umai Ene, la diosa maternal de la fertilidad y la protección en el folclore kirguís. Este artículo examina el papel de las canciones de cuna kirguises, o beshik ыры, en la formación de los lazos culturales y emocionales entre madre e hijo, y la protección espiritual invocada a través de figuras como Umai Ene. La investigación destaca el papel esencial de Umai Ene en la maternidad y el bienestar de los niños. Las canciones de cuna son parte integrante de las prácticas de crianza de los niños kirguises, con letras que a menudo invocan la protección divina, la naturaleza y los valores familiares. Estas canciones, cantadas durante ceremonias culturales como las beshik toi (celebraciones de la cuna), transmiten creencias espirituales y patrimonio cultural. El artículo también se basa en trabajos etnográficos y literarios que destacan el doble papel de las canciones de cuna como herramientas educativas y de crianza. Al relacionar las antiguas creencias espirituales con las prácticas contemporáneas, el artículo demuestra que las canciones de cuna sirven como herramientas para preservar la identidad cultural kirguís, al tiempo que garantizan la continuidad de tradiciones ancestrales.

Palabras clave: poesía kirguís, canciones de cuna, Umai Ene, identidad cultural, protección espiritual, diosa maternal, folclore, tradición kirguís, literatura infantil, creencias espirituales.

The cultural and social significance of maternal rituals in Kyrgyz identity formation

Abstract. Kyrgyz poetry dedicated to children, particularly lullabies, holds a deep cultural and spiritual significance. Central to these lullabies is the reverence for Umai Ene, the maternal goddess of fertility and protection in Kyrgyz folklore. This paper examines the role of Kyrgyz lullabies, or *beshtik ыры*, in shaping the cultural and emotional bonds between mother and child, and the spiritual protection invoked through figures like Umai Ene. The research highlights Umai Ene's essential role in childbearing and the well-being of children. Lullabies are integral to Kyrgyz child-rearing practices, with lyrics often invoking divine protection, nature, and familial values. These songs, sung during cultural ceremonies like *beshtik toi* (cradle celebrations, transmit spiritual beliefs and cultural heritage. The paper also draws on ethnographic and literary works that emphasize the dual role of lullabies as both nurturing and educational tools. By connecting ancient spiritual beliefs to contemporary practices, the paper demonstrates how lullabies serve as tools for preserving Kyrgyz cultural identity while ensuring the continuity of age-old traditions.

Key words: Kyrgyz poetry, lullabies, Umai Ene, cultural identity, spiritual protection, maternal goddess, folklore, Kyrgyz tradition, children's literature, spiritual beliefs.

INTRODUCTION

In Kyrgyz culture, children's literature plays an indispensable role in the spiritual and emotional upbringing of the younger generation. Among its many forms, lullabies stand out as profound expressions of love, protection, and cultural identity. These songs, passed down through generations, are not only meant to soothe infants but also to impart a sense of spiritual security, closely linked to the worship of *Umai Ene*, a maternal deity deeply embedded in Kyrgyz folklore. Revered as a protector of children and childbirth, *Umai Ene's* significance transcends the realm of mythology, influencing both ancient rituals and contemporary practices. Lullabies in Kyrgyzstan, known as *beshtik ыры*, reflect the intertwining of everyday maternal care and divine protection, highlighting a blend of emotional and spiritual nurture. Scholars, including Moldobaev (1999), have recognized the role of these songs in reinforcing familial bonds and connecting generations through shared cultural values. Furthermore, the influence of *Umai Ene* is not only symbolic but is an active part of the Kyrgyz collective consciousness, as reflected in rituals such as *ak bata* (blessings) and the language of lullabies. By examining the cultural, spiritual, and emotional aspects of Kyrgyz lullabies, this paper aims to explore how they serve as a crucial medium for transmitting both spiritual beliefs and cultural identity across generations. Through this lens, lullabies emerge as more than simple songs; they are powerful cultural artifacts that foster emotional growth while preserving the very essence of Kyrgyz heritage.

METHODS AND METHODOLOGY

This study uses a qualitative research methodology that includes literary analysis, cultural studies, and folklore research to explore the dimensions of Kyrgyz lullabies. By reviewing both primary and secondary sources, this paper examines the historical, cultural, and emotional significance of

lullabies within Kyrgyz society. Key to this study is the investigation of the symbolic roles of figures such as *Umai Ene*, the protective goddess of children, whose mythological and spiritual influence great on the cultural practices surrounding childbirth, blessings, and early childhood. The research emphasizes multi-disciplinary approach analyzing the linguistic and cultural features embedded in lullabies, their textual content and translation.

LITERATURE REVIEW

Kyrgyz literature dedicated to children encompasses a rich tapestry of storytelling and folklore, nurturing young minds while preserving cultural heritage. This literature review explores the role of Kyrgyz lullabies within the cultural and spiritual traditions of Kyrgyzstan, particularly in relation to the figure of *Umai Ene* (Mother Umai), a revered deity in Kyrgyz folklore. These lullabies, passed down through generations, reflect the emotional bonds between mother and child and the spiritual protection invoked through deities like *Umai Ene*. The importance of *Umai Ene* in Kyrgyz culture is researched with scholars such as Moldobaev (1999) highlighting the significance as the goddess of fertility and childbirth, believed to offer protection to mothers and children, Mahmud Kashkari left heritage writings about the wide influence of *Umai Ene*, whose blessings are sought in rituals like *ak bata*, especially during childbirth. Kyrgyz lullabies, or *beshik ырды*, are integral to the cultural identity of Kyrgyz families, with lyrics often invoking nature, animals, and divine protection, aligning with the deeply spiritual practices of child-rearing. These lullabies are traditionally sung during *beshik toi* (cradle ceremonies), where family members invoke *Umai Ene's* blessings for the child's health and well-being. Ethnographic studies underscore the emotional and spiritual significance of lullabies, which serve not only to soothe the child but also to transmit cultural values and beliefs, reinforcing the mother's role as a spiritual mediator and protector. Through these practices, lullabies in Kyrgyz culture continue to serve as a powerful medium for emotional, spiritual, and cultural transmission. In "History of Kyrgyz Children's Literature" by M. Tulagabylov (1991), the evolution of children's literature is chronicled, exploring development and societal significance. The anthology "Children's Folklore" created by S. Rysbaev, B. Abdukhamidova, and A. Batyrkulova (2012) presents a comprehensive collection of traditional tales and rhymes, reflecting the oral traditions deeply rooted in Kyrgyz culture. Similarly, "Anthology of Kyrgyz Children's Literature" edited by A. Akmataliev (2004) shows the diversity of contemporary works devoted for children, ranging from folk tales to modern stories. A.T. Sattarova's dissertation "Kyrgyz Children's Folklore: Genre Structure and Artistic Features" (2001) explores the structural and artistic elements of children's folklore, offering scholarly insights into its thematic richness and cultural significance.

Lullabies

Lullabies, as a form of folklore, hold a significant place in literature and culture, serving as vessels of tradition, identity, and heritage. Lullabies, a significant subset of folklore, are universally found across various cultures, serving as both soothing melodies for infants and as a means of bonding between caregivers and children. These songs, passed down orally through generations, reflect cultural values, societal expectations, and emotional expressions, marking an integral part of both the musical and literary heritage of a community (Brett, 1998; Clauson, 1972). According to the Oxford Dictionary of Nursery Rhymes (Opie & Opie, 1951), many lullabies are centuries old, reflecting the deep cultural roots they have in societies around the world.

Lullabies are not simply meaning of soothing children to sleep; they also carry vital cultural information. They often encode hopes and values that parents wish to impart to their children, such as strength, courage, and beauty. Notably, the content of lullabies may differ depending on the gender of the child, with lullabies for boys focusing on virtues like strength, while those for girls may emphasize tenderness (Adams, 1997). Lullabies are thus cultural texts, conveying significant moral, social, and emotional values (Green, 1968). S. Adams (1997) in “Poetic Designs” discusses the poetic structures found within lullabies, noting the aesthetic dimensions of these melodies. Bett (1968) examines the historical origins and evolution of lullabies in “Nursery Rhymes and Tales - their Origin and History,” providing insights into the cultural context in which these melodies emerged. G.T. Delamar (1987) examines the transition of lullabies from nursery rhymes to literature in “Mother Goose - From Nursery to Literature,” highlighting the transformation of these oral traditions into written texts. L. Eckensein (1906) offers a comparative analysis of lullabies from different cultures in “Comparative Studies in Nursery Rhymes,” illuminating the universal themes and motifs found within these melodies. Green (1968) provides a comprehensive history of lullabies in “A History of Nursery Rhymes,” tracing their development across time and space. Malof (1970) explores the metrical structures of English lullabies in “Manual of English Meters,” offering insights into the rhythmic patterns that characterize these melodies. “The Oxford Dictionary of Nursery Rhymes,” presents a dictionary of lullabies documenting the rich diversity of lullaby traditions from around the world. Bolotina et al. (1998) discuss the pedagogical implications of lullabies in early childhood education, emphasizing their role in cognitive development and emotional bonding. Bolshakova (2004) explores the cognitive benefits of exposure to folklore, highlighting the importance of lullabies in shaping cognitive development. The literature review also includes works, such as “Folklore in Childhood Development” by M. Bolshakova (2004) which provide insights into the cultural significance and meanings of lullabies in Kyrgyz culture. These works offer valuable perspectives on the role of lullabies in nurturing emotional bonds, preserving cultural heritage, and transmitting communal wisdom from one generation to the next.

In Kyrgyz culture, lullabies, known as *beshtik yry*, play a critical role in familial life. They are part of a broader tradition that connects the family unit, particularly the mother and child. Lullabies in Kyrgyz culture are deeply interwoven with the nomadic lifestyle, often reflecting the natural world and the community’s rural way of life. The tradition of singing lullabies has recently seen a revival, with competitions and public performances encouraging the preservation and continuation of this oral tradition (Tulogabylov, 1991).

The role of lullabies extends beyond mere entertainment or comfort; they are viewed as essential for the emotional development of children. Studies have shown that children deprived of lullabies may face psychological challenges in their later lives (Bolotina et al., 1998; Huntington, 1907). Furthermore, Kyrgyz lullabies embody a space for women’s creativity, providing an outlet for emotional expression in a society with traditionally limited roles for women in artistic fields (Shaidullaeva, 2004; Solter, 2001).

In comparison, English lullabies tend to reflect historical, religious, and even political themes, using nursery rhymes to comment on societal events or figures, thus blending the personal with the societal. English lullabies, unlike the nature-focused Kyrgyz ones, often contain layers of political satire or reflect on historical events (Opie & Opie, 1951). Despite their differences, both Kyrgyz and English lullabies serve the same fundamental purpose—providing comfort, instilling values,

and strengthening the emotional connection between caregiver and child. As modernity shifts societal norms, both cultures continue to adapt their lullabies to reflect contemporary realities while preserving their cultural heritage.

Spiritual belief: Umai Ene

“Бата менен эр көгөрөт, Жамгыр менен жер көгөрөт.” / *A man will prosper with blessings; The earth will be fertile with rain. (Kyrgyz saying)*

One of the oldest and most revered spiritual beliefs among the Kyrgyz people is the cult of *Umai Ene* (Mother Umai). Identified by researchers as the most significant Central Asian goddess, *Umai Ene's* blessings are still sought today. Revered as a maternal deity, she is often considered the archetype of ideal femininity. The qualities of *Umai Ene* are rooted in Kyrgyz folklore and oral traditions, where she symbolizes the very essence of motherhood, protection, and care. The name “*Umai Ene*” is rooted in the Turkic language, where “*umai*” refers to the womb or a nurturing figure, and “*ene*” means mother. This concept is explored in the work of Mahmut Kashkari, a great philosopher, who described *Umai Ene* as “a supporter of a child, owner, womb” (Al-Kashghari, 2005: 167). In his *Dictionary of Turkic Languages*, he emphasizes the deep connection between *Umai Ene* and the protection of life from birth onward (Al-Kashghari, 2005: 167). The belief that “*Umai Ene's* hands are healing for the baby” (*Умайга табынса, уул табат or Умай эненин колу ымыркайга эмдом болот*) reflects the reverence for her as a protector of newborns. As the goddess who oversees fertility and childbirth, *Umai Ene's* image embodies maternal traits and the foundational qualities of femininity in Kyrgyz culture. *Umai Ene's* character is considered sacred, and she is revered as the ideal female figure, with all positive female traits attributed to her.

In Kyrgyz mythology, *Umai Ene* is considered a key deity, second only to Tengri, the sky god. She is particularly revered as the protector of children and expectant mothers. Her presence is not only significant in ancient traditions but continues to be acknowledged in contemporary Kyrgyz life. Evidence of her divine role can be traced back to the Orkhon–Yenisei inscriptions from the 7th and 8th centuries, which mention her alongside other central deities such as Zher-Suu (Earth-Water) and Tenir (Sky). Interestingly, the word “*umai*” itself in ancient Turkic referred to the placenta and afterbirth, highlighting *Umai Ene's* role as a guardian of both birth and the life force of all children. In Mongolian, “*umai*” translates to “womb,” reinforcing the belief in her association with motherhood and fertility. In Tibetan, “*umai*” means “mother,” further establishing *Umai Ene's* sacred role as the maternal protector across cultures.

The mythological tales surrounding *Umai Ene* also illustrate her role in the birth of the hero *Manas*. A song recounts her assisting in the birth of *Manas*, guiding the child through the labor process:

*Умай Эне — периште,
Кирип келди эшиктен,
«Айтканымды ук деди,
Кана, сыртка чык» деди.
Куйругуна домдоду,
Кудай ишин оңдоду.
«Чыккын!» деди чакырып,
Энесинин ичинен,
Бала түштү бакырып...*

Umai Ene — Angel*Entering the door,**“Listen to me,” she said,**“Come, go outside,” she called,**Her tail swept,**God’s will she made.**“Come out now,” she called,**From the womb of his mother,**Crying baby came out.*

In this epic, *Umai Ene* is depicted as an angelic figure who aids in the birth, guiding the child from the womb with divine intervention. The Kyrgyz term “*perishte*” refers to a mythical angelic creature, highlighting *Umai Ene’s* elevated spiritual status. As the protector of mothers and children, her role is seen as integral to the family and community’s well-being.

Blessings, or *bata*, are an essential part of Kyrgyz spiritual life. These blessings are often invoked during significant life events, such as births, weddings, and journeys. The blessing of children, especially by respected elders, holds a special place in Kyrgyz traditions. One common blessing for children goes:

“Бул менин колум эмес, умай эненин колу, умай эне колдосун!”

“This is not my hand, it is Umai Ene’s hand. May Umai Ene support you!”

This invocation expresses the community’s deep connection to *Umai Ene’s* protective and nurturing qualities. The blessing invokes her divine assistance and reflects the enduring belief in her spiritual influence. In addition to verbal blessings, Kyrgyz people celebrate the birth of a child with the *beshtik toi* or cradle celebration. The child’s cradle is ceremonially prepared, often with traditional rituals. Grandmothers prepare the cradle by placing small sheep bones—*alchiks*—at the bottom, saying, “*On bol!*” (be lucky). Then, the mother is given the cradle, symbolically carrying the child in the hands of *Umai Ene*.

The cultural significance of lullabies across generations

Across all cultures, folk lullabies encapsulate profound wisdom and aesthetic beauty. These melodies serve as a gateway for infants to explore life and their immediate environment. Indeed, the nurturing of a baby often commences with the tender recital of a lullaby. As a mother sings, she pours her heart into her song, infusing it with profound emotions for her child. The formative development of a child, both physically and mentally, significantly hinges upon whether the mother serenades lullabies to her offspring. Scholars has established a correlation between exposure to lullabies during childhood and an individual’s cognitive prowess in adulthood (Bolshakova, 2004). She asserts that “lullabies, through nurturing speech development, contribute to the maturation of the brain” (Bolshakova, 2004: 46). This assertion underscores the contemporary significance of lullabies, where every child yearns for a sense of affection.

While we often associate these melodies with innocence and simplicity, their significance transcends their apparent simplicity. Exploring the rich tapestry of lullabies and nursery rhymes within Kyrgyz literature and culture, examining their cultural significance, historical roots, and contemporary relevance, we believe that lullabies represent one of the most ancient genres of oral folk art, serving as the very essence of human existence. Today, as in antiquity, mothers cradle their infants, singing simple yet profound melodies, as shown in folk songs (Sputnik Kyrgyzstan, 2021) and in the poem by Guljamila Shakirova (Roza Otunbaevanın Demilgesi, 2018):

Бешик ыры (элдик ыр)
 Алдей, алдей ак балам,
 Арка жөлөөр жан балам.
 Кунан койдун куйругу,
 Бышты жегин жан балам.
 Атаң барса айылга,
 Куржун толо эт келет.
 Энең барса айылга,
 Эмчек толо сүт келет.
 Кунан койдун сой балам,
 Куйругуна той балам.
 Алдей, алдей ак балам,
 Тердик токуур жан балам.
 LULLABY (FOLK SONG)
 Lullaby, my precious child,
 My comfort, my beloved.
 Feast upon the tender lamb's fatty tail,
 Nourish yourself, my cherished one.
 When your father attends to guests,
 A bounty of meat shall grace our home.
 And if your mother ventures out,
 She returns with overflowing milk.
 Slaughter a sheep, my son,
 Indulge in its richness, my little one.
 Lullaby, my darling child, lullaby,
 Wrap a sweatshirt on the horse, my son.

The folk song “*Beshik yry*” provides insight into the cultural practices and traditions of the Kyrgyz people, particularly regarding childcare and nourishment. Through tender words, the caregiver expresses deep affection for the child, referring to them as “my supporter, my dear,” emphasizing the nurturing bond between parent and infant. The song incorporates elements of traditional Kyrgyz cuisine, such as the mention of young sheep’s fatty tail, symbolizing the importance of nourishing the child with wholesome foods from an early age. Additionally, references to parental roles in providing sustenance highlight the communal and familial nature of childcare in Kyrgyz culture. The act of slaughtering a sheep to ensure the baby’s satiation reflects the cultural significance placed on hospitality and generosity, where no effort is spared to ensure the well-being of loved ones.

Moreover, the mention of putting a sweatshirt on the horse signifies the practicality and resourcefulness of Kyrgyz parenting, teaching children to become helpers from a young age and prioritizing warmth and comfort for both the infant and the future supporter of the family. Folk song “Lullaby” serves as not only a soothing melody but also a cultural artifact preserving and transmitting age-old traditions and values from one generation to the next.

Literary analysis of a poem “Lullaby” by Guljamila Shakirova

“Lullaby” by Guljamila Shakirova is a “*beshik yry*”, as an example that includes the hopes, dreams, and cultural heritage of the Kyrgyz people. Through tender words and gentle imagery, the

poem explores themes of parental love, guidance, and the transmission of cultural values from one generation to the next. We provide an analysis of the poem, focusing on its tone, speaker, national peculiarities, and impact on the listener.

“Lullaby” by Guljamila Shakirova

You came into this world, my sweet child,
Blessed by the grace of our ancestors of old,
You slumber peacefully, cradled
By the ancient melodies of your mother’s song.

Lullaby, my child, lullaby, sweet baby, lullaby,
Gently unfurl your wings.
Lullaby, my child, lullaby, pure and innocent, lullaby,
Rest in your pristine cradle.

Will you grow to be a prosperous soul,
Who tends to the needs of your kin?
Or will you inherit the generosity
Of your heroic Manas forebears?

My child, never stray into darkness,
Follow the path of goodness and light.
Sleep in your white cradle,
Bathed in the glow of celestial beams.

May you become a hero with a courageous heart,
Who cherishes and serves their people.
May you amass not just wealth, but also joy,
Through service to your country and kin.

Lullaby, my child, lullaby, sweet baby, lullaby,
Slowly spread your wings.
Lullaby, my child, lullaby, pure and innocent, lullaby,
Rest in your pristine cradle.

Sleep now, my darling, don’t shed a tear,
Umai Ene will cradle you in her arms.
May your pure world hear,
The earnest wishes of your mother’s heart.

My child, always choose the path of right,
And follow the footsteps of the virtuous.
Sleep in your white cradle,
Wrapped in the gentle glow of dawn.

May your dreams be filled with melodies,
As I wish above all for your health.

Lullaby, my child, lullaby, sweet baby, lullaby,
Gently spread your wings.
Lullaby, my child, lullaby, pure and innocent, lullaby,
Sleep in your pristine cradle.

In Kyrgyz culture, the act of placing a baby in a crib carries cultural significance, drawing from rich traditions and beliefs ingrained in the community. The white cradle, symbolizing purity and protection, serves as a sacred space where the newborn is cradled in the loving embrace of both earthly and spiritual guardians. References to cultural icons such as *Umai ene*, the maternal deity known for her nurturing care, and the legendary hero Manas, evoke a sense of ancestral connection and divine protection, reinforcing the belief in the interplay between the physical and metaphysical realms in safeguarding the infant’s well-being. Through the ritualistic act of placing the baby in the crib, parents not only provide a peaceful environment for rest but also impart moral values, instilling virtues of prosperity, generosity, and courage, as depicted in Guljamila Shakirova’s poem “Lullaby”. As such, the cradle becomes more than just a piece of furniture; it becomes a vessel through which cultural heritage, familial love, and spiritual blessings converge, nurturing the newborn and fostering a deep sense of belonging within the community.

In Kyrgyz culture, placing a baby in a crib involves customs and beliefs that emphasize respect, tradition, and care. The baby cradle is considered a sacred object and should not be sold once the child outgrows it, though it may be lent with the expectation of return. It is important to avoid rocking an empty cradle, as it is believed to symbolize negativity and childlessness. The crib must always be covered, and rituals are performed to safeguard it when the baby is not using it. The baby should be placed in the crib from the right side, and when purchasing a cradle, haggling over the price is discouraged. Certain actions, such as rocking the cradle with feet or lifting it with two people, are considered disrespectful or inappropriate. Additionally, the crib should not be used as a plaything, as it is solely for the child’s rest and safety.

These customs and beliefs surrounding baby cribs in Kyrgyz culture reflect the community’s deep respect for tradition, symbolism, and the well-being of their children.

TABLE 1. Literary and cultural aspects of the poem “Lullaby” by Guljamila Shakirova

Aspect	Description
Tone	Tender, loving, and protective. The tone conveys deep care and concern for the child’s well-being, offering warmth and reassurance to both speaker and listener.
Speaker	Presumably a parent, offering words of affection, guidance, and wisdom. Expresses profound love and hopes for the child’s future, serving as a nurturing presence.
Cultural Heritage and National Identity	Reflects Kyrgyz cultural heritage through references to ancestral lineage, traditional values, and iconic figures like “Manas ancestor” and “Umai ene.”
Cultural Specificities	Includes culturally specific words and references such as “Manas ancestor” and “Umai ene,” grounding the poem in Kyrgyz traditions and mythology.
Impact on the Listener	Evokes feelings of warmth, security, and reassurance, fostering a deep emotional connection between parent and child. Instills hope and optimism for the future.

CONCLUSION

In conclusion, the literature review highlights the multifaceted nature of lullabies in Kyrgyz culture, encompassing aesthetic, historical, pedagogical, and cultural dimensions. By synthesizing insights from diverse scholarly works, this review contributes to a deeper understanding of the role of lullabies in shaping identity, fostering connections, and preserving heritage within Kyrgyz society. Placing a baby in a crib in Kyrgyz culture involves adhering to specific customs and beliefs rooted in tradition, emphasizing respect for the cradle as a sacred object and ensuring the well-being of the child. "Lullaby" by Guljamila Shakirova is a beautiful expression of parental love, cultural heritage, and aspirations for the future. Through its tender tone, nurturing speaker, national peculiarities, and impact on the listener, the poem offers a timeless reminder of the enduring bond between parent and child, and the power of cultural identity to shape our hopes and dreams. In conclusion, lullabies occupy a central place in Kyrgyz culture, serving as vessels of tradition, identity, and heritage. Through their tender melodies and heartfelt lyrics, lullabies nurture emotional bonds between mothers and children while transmitting cultural values from one generation to the next. As repositories of communal wisdom and expressions of maternal love, lullabies continue to play a vital role in shaping the cultural landscape of Kyrgyzstan, preserving traditions, and fostering connections between past, present, and future.

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Conocimientos y opiniones de las familias y docentes sobre el acoso escolar entre iguales

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Resumen. El artículo describe comparativamente los conocimientos y opiniones de los docentes (41), que trabajan en diversas escuelas en la República Turca del Norte de Chipre (RTNC), y de las familias (41) cuyos hijos asisten a dichas escuelas, con respecto al acoso escolar entre iguales, y ofrecer sugerencias para solucionar el problema. Se utilizó un enfoque mixto y se preparó un formulario de entrevista. Se utilizaron formularios estructurados para recopilar datos cuantitativos, y se aplicaron estadísticas descriptivas para analizarlos. El análisis estadístico de los datos cuantitativos se realizó mediante el software de análisis SPSS 24.0, y los hallazgos se presentaron en tablas e interpretaron. En la parte cualitativa del estudio, se recopilaron datos mediante entrevistas en profundidad con docentes basadas en la pregunta semiestructurada. Los hallazgos confirman que, tanto los docentes como las familias perciben el acoso escolar entre iguales como un problema grave que debe abordarse. Los docentes participantes creen en general que el acoso se origina en problemas familiares. Los resultados constatan que el acoso entre iguales representa una amenaza seria en las escuelas de la RTNC y que, aunque los docentes y las familias poseen un conocimiento suficiente sobre el tema, no logran prevenir el problema. El acoso, que hoy afecta gravemente a nuestra sociedad y representa una amenaza para el futuro, debe abordarse desde la familia, que es el pilar fundamental de la sociedad. Deben realizarse esfuerzos de apoyo en diversas áreas de la sociedad en relación con este problema.

Palabras clave: acoso escolar entre iguales, RTNC, familia, docente, niño.

Families' and teachers' knowledge and views on peer bullying in schools

Abstract. The article comparatively describes the knowledge and opinions of teachers (41), working in various schools in the Turkish Republic of Northern Cyprus (TRNC), and families (41) whose children attend these schools, regarding peer bullying, and offers suggestions to address the issue. A mixed-method approach was used, and an interview form was prepared. Structured forms were used to collect quantitative data, and descriptive statistics were applied to analyze them. Statistical analysis of the quantitative data was conducted using SPSS 24.0 software, and the findings were presented in tables and interpreted. In the qualitative part of the study, data were collected through in-depth interviews with teachers based on a semi-structured question. The findings confirm that both teachers and families perceive peer bullying as a serious problem that must be addressed. The participating teachers generally believe that bullying originates from family-related issues. The results confirm that peer bullying represents a serious threat in schools in the TRNC and that, although teachers and families possess sufficient knowledge on the subject, they fail to prevent the problem. Bullying, which today seriously affects our society and poses a threat to the future, must be addressed starting from the family, which is the fundamental pillar of society. Support efforts must be made in various areas of society in relation to this issue.

Keywords: peer bullying, TRNC, family, teacher, child.

INTRODUCTION

Nowadays, peer bullying is a behaviour that involves both physical and psychological violence and unfortunately it is very common in primary schools, secondary schools, and universities. Individuals who engage in physical bullying harm others through violence, whereas those who engage in psychological bullying aim to distress and cause pain to individuals through hurtful words or behaviours. Today, physical bullying among boys in schools has shown a significant increase, while girls are more exposed to psychological bullying. In addition, another type of bullying that has been on the rise in schools today, especially through social media and digital platforms, is cyberbullying. Cyberbullying is also known as a repeatedly occurring behaviour that aims to intimidate and disturb the other individuals, following a similar pattern to other forms of bullying. In schools today, children from poor families, children with disabilities, and refugee children, who are more vulnerable and marginalized in society, are observed to be more frequently exposed to bullying. Peer bullying has many reasons, but the most common ones are as followed; the bullying children see themselves as superior to their peers, they do not get enough attention from their families, and they have difficulties in communicating with their friends. In a study, school principals and guidance counsellors identified the main causes of bullying as students' lack of communication skills, their limited access to sufficient social activities at school to express themselves, their lack of problem-solving abilities, and the lack of interest from their families (Genç, 2007). Similarly,

in a study conducted in 2010, Keskin stated that in situations where family relationships are weakened and individuals fail to fulfill their responsibilities within the family, children tend to exhibit aggressive behaviours and are more prone to criminal activities (Keskin, 2010).

If not addressed, peer bullying can lead to lasting damage both on an individual and societal level. Bullied children often begin to show signs of reluctance toward school, loss of self-confidence, and psychological issues such as depression and anxiety. Among the leading factors that negatively affect the school environment are vandalism, violence, technology and internet addiction, bullying, peer bullying, and cyber peer bullying. These incidents, which disrupt the school environment and create feelings of fear and anxiety among students, can lead to behaviours such as absenteeism, alienation from school, and even dropping out in later years (Hamurcu, 2020). In addition, students who engage in bullying also exhibit serious behavioural problems. Peer bullying behaviours experienced in the preschool period are a very important issue in terms of having long-term developmental effects not only on bullied children but also on the bully children (Gün & Akduman, 2022). As a result of such behaviours that seriously threaten individuals' physical and psychological health, the country's education system is harmed, leading to societal desensitization toward violence and an increase in crime rates. In many countries today, violent and aggressive behaviours among children and adolescents are a widespread public health issue that causes significant social consequences in long term (Polat & Sohbet, 2020).

Today, even in developed countries, peer bullying is considered a serious issue, and preventing it requires collective action from the whole society. Findings indicating that behaviours related to peer bullying in schools have been increasing in recent years highlight the need for the development of local and national policies to address the issue (Doğan & Keleş, 2023). It should not be forgotten that peer bullying is not only a form of behaviour that threatens individuals and reduces their quality of life, it is a much more comprehensive problem that threatens the safety of society in general. Therefore, it is important to conduct scientific studies on peer bullying from various perspectives and offer solutions to this problem, in order to raise societal awareness, support healthy child development, and create school environments where children feel safe. In line with this purpose, the present study aims to comparatively determine the knowledge and opinions of teachers working in various schools in the TRNC and of parents whose children attend these schools regarding peer bullying, which is an increasingly prevalent issue, and to propose solutions based on the findings obtained. In this context, answers to the following questions were sought:

RQ1- What is the level of knowledge and views of teachers in TRNC regarding peer bullying?

RQ2- What is the level of knowledge and views of families in TRNC regarding peer bullying?

RQ3- What should be done to eliminate peer bullying in schools?

Limitations

This study is limited to 41 teachers working in different schools in Northern Cyprus and 41 families whose children attend different schools.

METHODOLOGY

Research Method

A mixed-method was used in the study. The purpose of this was to use both qualitative and quantitative methods in order to diversify, compare, and integrate the data obtained, and

also to collect different types of data that are directly related to the research questions. In this design, the aim is to compensate for the weaknesses of one method (quantitative or qualitative) with the strengths of the other (Morse, 2003; Yıldırım & Şimşek, 2013, 355; Fetters, 2013; Creswell & Calrk, 2017). In this study, data were collected through 10 quantitative and 1 qualitative question.

Sample and Sampling Method

The sample of the study consists of 41 teachers working in different schools and 41 families whose children attend in various schools in Northern Cyprus. A random sampling method was used to select the participants. In this study, participants from different schools and cities were selected in order to increase diversity and representativeness, and to obtain a more balanced and efficient sample.

Selecting 41 participants from each group provides a suitable framework for both identifying general trends and examining individual views in depth. Additionally, 41 participants is a sufficient number to obtain data in a semi-structured interview.

Data Collection Tool

An interview form was used to obtain the data. The interview form was prepared by the researchers and consists of 10 structured questions and 1 semi-structured question. In the structured questions, options were provided, and participants were asked to select one option. In the semi-structured question, teachers were asked for their suggestions regarding the solution to peer bullying. After the survey questions were prepared, feedback was obtained from two experts (an educator/pedagogue and a psychologist), and based on their feedback, the survey was restructured.

Data Analysis Method

In this regard, structured questionnaire forms were used to collect quantitative data, and descriptive statistics were applied in the analysis of the data. The statistical analysis of the quantitative data in the study was carried out using the SPSS 24.0 data analysis software, and the findings were subsequently presented in tables and interpreted.

In the qualitative part of the study, data were collected through in-depth interviews with teachers based on the semi-structured question. In-depth interview is a data collection technique based on verbal communication between the researcher and the participant, regarding the topic (Uslu & Demir, 2023). "In-depth interviews are data collection techniques in which open-ended questions are asked, allowing for detailed responses. This method involves face-to-face, one-on-one interviews, providing the opportunity to gather information on all aspects of the topic being researched. It provides access to the feelings, knowledge, experiences, and observations of the interviewee" (Tekin, 2006). The views obtained during the interviews regarding the topic are provided in the findings section of the study.

RESULTS

In this part of the study, the findings obtained are presented comparatively.

TABLE 1. Findings regarding the child's exposure to bullying behaviour at school/classroom

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Yes, the child is highly exposed.	14,6	6	Yes, I encounter quite frequently.	53,7	22
No, the child is never exposed.	9,8	4	No, I never encounter.	-	
The child is sometimes exposed.	68,3	28	I sometimes encounter.	46,3	19
I have no opinion.	7,3	3	I have no opinion.	-	

As can be seen in Table 1, 14,6% of families answered "Yes, the child is highly exposed" 9,8% answered "No, the child is never exposed" 68,3% answered "The child is sometimes exposed" and 7,3% answered "I have no opinion." When looking at the families' responses, it was found that only 9,8% of children had never been exposed to bullying, which is a very low percentage. Another striking finding was that 7,3% of the families had no idea whether their child was bullied or not. Looking at the findings, it can be seen that the majority of the families stated that their children were exposed to bullying.

On the other hand, 53,7% of the teachers answered "Yes, I encounter quite frequently" and 46,3% answered "I sometimes encounter". Looking at the teachers' findings, it was determined that there were no responses as "No, I never encounter" or "I have no opinion." Based on the teachers' findings, it was concluded that all the teachers have encountered peer bullying.

When the findings obtained from teachers and families are compared, it is seen that the number of students exposed to peer bullying in schools is quite high.

TABLE 2. Findings regarding the types of bullying the child was exposed to at school/classroom

Family	%	<i>f</i>	Teacher	%	<i>f</i>
The child was exposed to physical bullying.	41,2	14	The child was exposed to physical bullying.	34,1	14
The child was exposed to emotional bullying.	5,9	2	The child was exposed to emotional bullying.	7,3	3
The child was exposed to verbal bullying.	32	11	The child was exposed to verbal bullying.	46,3	19
The child was exposed to social bullying.	5,9	2	The child was exposed to social bullying.	4,9	2
The child was exposed to cyber bullying.	-		The child was exposed to cyber bullying.	2,4	1
The child was exposed to property bullying.	15	5	The child was exposed to property bullying.	4,9	2
The child was exposed to sexual bullying.	-		The child was exposed to sexual bullying.	-	

Based on the findings in Table 2, the families reported that 41,2% of their children were exposed to physical bullying, 5,9% to both emotional bullying and social bullying, 32% to verbal bullying, and 15% to property bullying. (In Table 1, 9.8% of the families answered as "no, the child is never exposed" and 7.3% answered as "I have no opinion", so they left this

question unanswered. Also, it was determined that their children had never been exposed to cyber bullying or sexual bullying.

As can be seen from the teachers' findings, 34.1% of students were exposed to physical bullying, 7.3% to emotional bullying, 46.3% to verbal bullying, 4.9% to both social bullying and property bullying, and 2.4% to cyber bullying. Based on the teachers' findings, it was determined that students had not been exposed to sexual bullying.

When the findings obtained from teachers and families are compared, it was concluded that children are most commonly exposed to physical and verbal bullying at schools.

TABLE 3. Findings regarding the situations in which the bully child usually engages in bullying

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Due to power imbalance	14,6	6	Due to power imbalance	29,3	12
Due to family problems	34,1	14	Due to family problems	36,6	15
Due to lack of anger control	34,1	14	Due to lack of anger control	14,6	6
Due to peer group pressure	17,2	7	Due to peer group pressure	19,5	8

Based on the findings in Table 3, families reported that 14,6% of bully children engage in bullying due to power imbalance, 34,1% both due to family problems and lack of anger control, and 17,2% due to peer group pressure.

Looking at the teachers' findings, 29,3% stated that bullying was due to power imbalance, 36,6% was due to family problems, 14,6% was due to lack of anger control, and 19,5% was due to peer group pressure.

When comparing the findings obtained from teachers and families, it was found out that the majority of the families believe that the bullying behaviour of the child is due to lack of anger control, while the majority of the teachers believe that the bullying behaviour is due to family problems.

TABLE 4. Findings regarding the symptoms displayed by the child who was exposed to bullying

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Reluctance to socialize	36,6	15	Reluctance to socialize	26,8	11
Lack of self-confidence	17,2	7	Lack of self-confidence	43,9	18
Refusing to go to school	31,6	13	Refusing to go to school	14,6	6
Sleep problems	14,6	6	Sleep problems	-	-
Failure in lessons	-	-	Failure in lessons	14,6	6

Based on the findings in Table 4, families reported that 36,6% of the students who were bullied were reluctant to socialize, 12,7% had a lack of self-confidence, 31,6% refused to go to school, and 14,6% experienced sleep problems.

Looking at the teachers' findings, it was determined that 26,8% of the students were reluctant to socialize, 43,9% experienced a lack of self-confidence, 14,6% refused to go to school, and similarly 14,6% faced failure in their lessons.

When comparing the findings of obtained from families and teachers, the majority of families expressed that the child who was bullied typically experienced reluctance to socialize. On the other hand, the majority of teachers stated that the students who were bullied experienced a lack of self-confidence.

TABLE 5. Findings regarding the child's witnessing of bullying towards others

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Yes, the child witnessed	51,2	21	Yes, the child witnessed	48,8	20
The child occasionally witnessed	31,6	13	The child occasionally witnessed	36,6	15
No, the child did not witness	-		No, the child did not witness	2,4	1
I have no opinion	17,2	7	I have no opinion	12,2	5

Based on the findings in Table 5, 51,2% of families stated that their child has witnessed bullying, 31,6% said their child has occasionally witnessed bullying, and 17,2% expressed that they have no opinion on whether their child has witnessed bullying. It was also determined that none of the families responded their child did not witness bullying.

According to the teachers' findings, 48,8% stated that the student has witnessed bullying, 36,6% said the student has occasionally witnessed bullying, 2,4% reported that the student has not witnessed bullying, and 12,2% expressed that they have no opinion.

When comparing the findings of obtained from families and teachers, it was determined that the majority of both families and teachers expressed that the child has witnessed peer bullying.

TABLE 6. Findings regarding what the child did if he/she witnessed bullying

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Felt guilty	-	-	Felt guilty	-	
Thought the bullied child deserved it	-	-	Thought the bullied child deserved it	17,5	7
Remained silent	17,6	6	Remained silent	47,5	19
Complained/Reported it	82,4	28	Complained/Reported it	35	14

Based on the findings in Table 6, 17,6% of the families reported that their child remained silent after witnessing bullying, while 82,4% stated that their child complained/reported it. It was also found that none of the families responded as "the witnessed child felt guilty" or "the witnessed child thought the bullied child deserved it". (In table 5, 17.2% of the families did not express an opinion on whether they witness bullying or not. So, they did not answer this question).

According to the findings obtained from the teachers, 17,5% of the teachers stated that the witnessed child believed the bullied child deserved it, 47,5% reported that the witnessed child remained silent, and 35% indicated that witnessed child complained/reported the bullying. (Similarly, in the fifth table, 2.4% of the teachers stated that the child did not witness bullying and left this question unanswered).

When comparing the findings from the families and teachers, it was found out that the majority of families stated that the witnessed child complained/reported the bullying, whereas the majority of the teachers indicated that the witnessed child remained silent.

TABLE 7. Findings regarding the reasons of peer bullying behaviour

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Cowardice	2,4	1	Cowardice	-	-
Cruelty	12,2	5	Cruelty	17,2	7
Weakness	2,4	1	Weakness	2,4	1
Aggression	36,6	15	Aggression	19,5	8
Jealousy	17,2	7	Jealousy	2,4	1
Loneliness	7,3	3	Loneliness	4,9	2
Unhappiness	12,2	5	Unhappiness	12,2	5
Desire to be popular	7,3	3	Desire to be popular	36,6	15
Low self-esteem / self-disgust	2,4	1	Low self-esteem / self-disgust	4,9	2

Based on the findings in Table 7, families identified the reasons of peer bullying behaviour as follows: 2,4% attributed it to cowardice, weakness, and low self-esteem / self-disgust; 12,2% both to cruelty and unhappiness; 36,6% to aggression; 17,2% to jealousy, and 7,3% to both the child's desire to be popular and loneliness.

According to the teachers' findings, 17,2% attributed peer bullying behaviour to cruelty, 2,4% to weakness and jealousy, 19,5% to aggression, 4,9% to loneliness and low self-esteem/ self-disgust, 12,2% to unhappiness, and 36,6% to the desire to be popular.

When comparing the findings obtained from the families and teachers, it can be seen that the majority of the families identified aggression as the primary reason of peer bullying behaviour, while the majority of teachers attributed it to the child's desire to be popular.

TABLE 8. Findings regarding the solution suggestions for preventing bullying.

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Help should be sought from the guidance service	39	16	Help should be sought from the guidance service	53,7	22
Help should be sought from the administration	9,8	4	Help should be sought from the administration	12,2	5
Help should be sought from the teacher	39	16	Help should be sought from the teacher	7,3	3
Help should be sought from the families	12,2	5	Help should be sought from the families	26,8	11

Based on the findings in Table 8, 39% of the families stated that help should be sought from the guidance service and teachers to prevent bullying, 9,8% suggested that help should be sought from both the administration, and 12,2% suggested that help should be sought from the families.

According to the teachers' findings, 53,7% stated that help should be sought from the guidance service, 12,2% suggested that help should be sought from the administration, 7,3% suggested that help should be sought from the teacher, and 26,8% suggested that help should be sought from the families.

When comparing the findings obtained from the families and teachers, it can be seen that the majority of both the families and teachers suggested that help should be sought from the guidance service to address bullying. Secondly, it was found that families mostly recommended seeking help from the teacher, while teachers proposed seeking help from the family as the solution.

TABLE 9. Findings regarding whether the bullying that the child experienced was resolved or not

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Yes, problem resolved	32,3	11	Yes, problem resolved	34,1	14
No, the problem persists	5,9	2	No, the problem persists	17,2	7
The problem was resolved, but the child faced another form of bullying	26,5	9	The problem was resolved, but the child faced another form of bullying	7,3	3
The problem was partially resolved	35,3	12	The problem was partially resolved	41,4	17

As can be seen in Table 9, 32,3% of the families stated that the problem was resolved, 5,9% mentioned that the problem persists, 26,5% indicated that the problem was resolved but the child encountered another form of bullying, and 35,3% stated that the problem was partially resolved. (As 9.8% of the families stated that in table 1 that the child is not exposed to bullying and 7.3% of the families stated that they have no opinion if the child is exposed to bullying, they did not express any opinion on whether the bullying was resolved or not).

On the other hand, 34,1% of the teachers stated that the problem was resolved, 17,2% mentioned that the problem persists, 7,3% indicated that the problem was resolved but the child encountered another form of bullying, and 41,4% stated that the problem was partially resolved.

When comparing the findings from the families and teachers regarding the resolution of the bullying the child experienced, it was found out that the majority of the families reported that the problem was resolved. In contrast, the majority of the teachers stated that the problem was partially resolved. Looking at both family and teacher findings, it was found that approximately 40% of the cases were resolved.

TABLE 10. Findings regarding how the bullying was resolved

Family	%	<i>f</i>	Teacher	%	<i>f</i>
Resolved by the class teacher	58,3	18	Resolved by me personally	5,9	2
Resolved by the administrator	8,3	2	Resolved by the administrator	11,5	4
Resolved by the guidance service	11,2	4	Resolved by the guidance service	56	19
The bully child left the school/class	22,2	8	The bully child left the school/class	3	1
My child left the school/class	-		The bullied child left the school/class	3	1
Resolved by the family	-		Resolved with the help of the family	20,6	7

As seen in Table 10, regarding the resolution of bullying, 58,3% of the families stated that the issue was resolved by the teacher, 8,3% said it was resolved by the administrator, 11,2% said it was resolved by the guidance service, and 22,2% said the issue was resolved because the bully child left the school/class. Based on the findings from the families, there was no response indicating that “my child left the school/class” or “the bully student’s family resolved the issue”. (In table 9, 5.9% of the families had stated that the problem persists and not resolved, and in table 1 9.8% of the families had stated that the child is not exposed to bullying and 7.3% had stated that they had no idea. So, they did not express any view on how the bullying was resolved).

According to the findings obtained from the teachers, 5,9% of the teachers stated that the issue was resolved by themselves, 11,5% said it was resolved by the administrator, 56% indicated that it was resolved by the guidance service, 3% mentioned that the bully child left the school/class and similarly 3% stated that the bullied child left the school/class, and 20,6% reported that the issue was resolved with help from the bully student’s family. In addition, 17.2% of the teachers had stated in table 9 that there is no solution to bullying in schools, so they left this question unanswered.

When comparing the findings from the families and teachers, it can be seen that the majority of the families reported that the issue was resolved by the class teacher. On the other hand, the majority of the teachers stated that the issue was resolved by the guidance service. Based on this, it can be said that the family first informed the class teacher, and the class teacher then informed the guidance service, leading to the solution of the problem. Looking at the findings of both the families and teachers, it is seen that the school administrator was not very effective in resolving the issue. Another finding is that while bullied child’s families were unable to resolve the problem with the bully’s families, teachers were able to resolve it mostly by seeking help from the bully’s families.

Findings Regarding Families' Views on Peer Bullying

TABLE 11. Findings Regarding Families' Views on Solutions to Peer Bullying

Category	<i>f</i>
Seminars should be held	8
The number of guidance counsellors should be increased	17
Families should pay more attention to their children	4
Psychology graduates should be appointed as teachers in schools	14
Teachers should raise awareness among their students on this issue during lessons	12
Violence at home should be prevented	8
Children should be kept away from social media	3
It should be prevented with the collaboration between families, teachers and guidance services	9
Bullying students should be punished and expelled from school	15

As can be seen in Table 12, regarding solutions to peer bullying, families expressed the following opinions: seminars should be held, violence at home should be prevented (stated by 8 families), the number of guidance counsellors should be increased (stated by 17 families), families should pay more attention to their children (stated by 4 families), psychology graduates should be appointed as teachers in schools (stated by 14 families), teachers should raise awareness among their students on this issue during lessons (stated by 12 families), children should be kept away from social media (stated by 3 families), bullying should be prevented with the collaboration between families, teachers and guidance services (stated by 9 families), and bullying students should be punished and expelled from school (stated by 15 families).

Quotes from family views;

"It is very important for my child to be in a safe environment. Unfortunately, families are unconscious and the school administration does not pay much attention to this issue. Therefore, there should definitely be a psychological counsellor in the school where my child can get help and the number of guidance counsellors should be increased."(P1)

"When a bullying child alienates the other children from school, it creates a negative impression on the school. It is important to impose sanction to the bullying child. I think the bullying child should be suspended from the school and the bullied children should be supported." (P4)

"I think that family consciousness, and a warm family environment has disappeared. Psychological problems are at the highest level and families are not willing to solve anything if their child is not bullied. First of all, families should be educated on this issue. My child has become disenchanted with school, I don't know how to approach them. The school administration is not enough to solve this issue and they expect everything to be solved by the guidance counsellor and class teacher. The number of guidance counsellors is also not enough, there are too many problematic students and they cannot keep up. I think psychological counsellors should be assigned to schools as soon as possible so that our children can be in a safer environment." (P18)

"I think, first of all, violence in the family should be prevented, and I think that teachers and school administration should get to know the children closely. Most of the time, even if a child has a problem, teachers and school administration do not take measures before the problem gets bigger and more serious. They do not inform the family. At the point of solving the problem, instead of supporting bullied child and family, they try to cover up the problem as if there is no problem. Unless we, as families, get support from the school administration, we cannot solve the problem."(P29)

Findings Regarding Teachers' Views on Peer Bullying

TABLE 12. Findings Regarding Teachers' Views on Solutions to Peer Bullying

Category	<i>f</i>
Seminars should be held	8
The number of guidance counsellors should be increased	8
Families should pay more attention to their children	15
Psychology graduates should be appointed as teachers in schools	6
Teachers should raise awareness among their students on this issue during lessons	9
Violence at home should be prevented	4
Children should be kept away from social media	3
It should be prevented with the collaboration between families, teachers and guidance services	19
Bullying students should be punished and expelled from school	5
Bullying students should be enrolled in activities such as sports or arts, and their socialization should be ensured	5

As can be seen in Table 12, regarding solutions to peer bullying, teachers expressed the following opinions: 8 teachers stated that seminars should be held and the number of guidance counsellors should be increased, 15 teachers mentioned that families pay more attention to their children, 6 teachers suggested that psychology graduates should be appointed as teachers in schools, 9 teachers emphasized that teachers should raise awareness among students on this issue during lessons, 4 teachers highlighted the need to prevent violence at home, 3 teachers mentioned that children should be kept away from social media, 19 teachers stated that there should be collaboration between families, teachers, and the guidance service, 5 teachers suggested that bullying students should be punished and expelled from school, and bullying students should be directed to activities where the socialization can be ensured.

Based on this, it has been found out that teachers predominantly believe that there should be collaboration between families, teachers, and the guidance service, and that families should be more involved and pay more attention to their children.

Quotes from teacher views;

"The teachers should be in consultation with families and the school counselling service, and the number of counselling and guidance teachers should be increased."(P1)

"In schools, the guidance services should be more active, families should exhibit more love and spend time with their children, activities that develop empathy should be organized, concepts such as love, re-

spect, and tolerance should be emphasized in the classroom, and the uniqueness of each individual should be made to feel by children from an early age...”(P2)

“Psychological support should be provided. In some cases, school counsellors are insufficient because they need to attend to too many students. The number of counsellors should be increased, and one psychology graduate teacher should be appointed at schools.”(P3)

“Empathy should be frequently emphasized in lessons at schools. Families should not ignore complaints about their children and should seek support together with their child. Considering that not every family may have the means to access this support, this service should be offered for free in schools.”(P3)

“We urgently need guidance counsellors and psychologists. The teacher is inadequate in dealing with this issue. These problems need to be taken seriously and addressed immediately.”(P6)

“Information about the family’s cultural and socio-economic status should be gathered, and firstly it should be determined whether the child is experiencing bullying at home. It is necessary to prevent repressed emotions from being directed towards peers at school.”(P8)

“This problem is increasing every year. I believe children should be kept a bit away from social media. Activities that focus on friendship and communication should be increased at school. TikTok should be banned, and Squid Game should be removed from broadcasting. Violence-based games, series, and movies should be removed from the media, and educational and entertaining content should be prioritized. Families should be more sensitive and conscious about this issue.”(P11)

“Support should be provided to help the child establish healthy communication with their family and environment. The child should be guided towards activities they enjoy and are interested in, and should be integrated into friend groups.”(P13)

“The teacher should intervene immediately. The school administration should take strict measures. The person engaging in bullying should be removed from the school environment immediately. If the punishment mechanism is not activated, the negative behaviour continues. Since I personally experienced it, I can say that no measure worked, as the family was indifferent. I believe the issue is because of the family rather than the child.”(P25)

DISCUSSION

Based on the literature review, it has been determined that bullying is a significant problem in schools and that a large number of children are exposed to peer bullying. UNICEF also emphasizes that one out of every two children in the world is exposed to peer bullying. Eray et al. also found in their study that more than one third of students at all school levels are involved in the peer bullying cycle. According to UNESCO’s findings, bullying affects approximately one-third of children worldwide. Similarly, Akpınar and Akpınar found in their study that all teachers had observed peer bullying in the schools where they work.

In the study on types of bullying, it was found that physical and verbal bullying were the most commonly observed types. Similarly, Roberts also stated in his study that physical bullying is one of the most common type of bullying. According to a study conducted by Tanrikulu et al., which examined physical, social, and verbal bullying behaviours at preschool period, it was concluded that verbal bullying behaviours tend to increase with age.

Green and Turner emphasized that verbal abuse and exclusion have serious negative effects on a student's academic performance. The literature also emphasizes that psychological bullying has more long-lasting traumatic effects compared to physical bullying. As can be seen, even though the type of bullying varies, the effects it leaves on children negatively affect their lives. Therefore, children who are at risk of or affected by bullying or any violent behaviour should have access to psychological support and counselling services in schools. For this purpose, psychologists should be assigned to schools by the Ministry of National Education and students should have access to mental health, psychological help and counselling services in schools. Sun and Cao, in their study, concluded that being exposed to peer bullying during children's developmental stages is a significant factor affecting their healthy development.

In a study conducted by Mermer, it was found that almost half of the students did not feel safe at school. Schools are the places where children spend most of their times. Ensuring children's safety in schools and transforming the school into a safe environment for children is a priority. Children not only learn academic knowledge at school, but also gain friendship, sharing, cooperation and trust emotions. In order to transform schools into a safe environment for children, teachers should emphasize empathy, friendship, sharing and cooperation in their lessons, which will be effective in preventing physical and verbal bullying.

Gökler stated that families play a significant role in a child's aggressive behaviour and inappropriate Family approaches, such as intolerance, authoritarianism, and the use of violent methods in child-rearing, affect the way the child interacts with their social environment.

White and Anderson underlined in their study that educating families and ensuring their active participation in school processes are effective in reducing peer bullying.

Cenkseven Önder and Yurtal also highlighted in their study that children who perceive their families as overly controlling and believe that there is not enough warmth in their family are more likely to become bullies.

Chrysanthou and Vasilakis (2020) emphasized in their study that experiencing bullying during adolescence leads to internalization disorders such as anxiety, social withdrawal, depression, and psychosomatic symptoms in the bullied person, as well as externalization disorders such as hyperactivity, property damage, physical and verbal aggression, and a tendency towards criminal behaviour.

Xue et al. (2020) stated that the individuals who experience bullying exhibit higher levels of insecurity, becoming introverted, anxiety, depression, loneliness, unhappiness, physical and mental symptoms, and low self-esteem compared to their peers. Additionally, they experience difficulties in making friends and creating relationships with classmates. For this reason, children should be informed about this issue before they are exposed to bullying and should be made aware of how to cope with bullying. Awareness and well-being seminars should be organized for children and families.

CONCLUSION

Based on the findings of this study, which aims to reveal the opinions of families and teachers regarding peer bullying, significant results have been found out. According to the findings of the study, the majority of families indicated that their child has been exposed to peer bullying or has witnessed peer bullying. All of the teachers who participated in the study think that students are

exposed to peer bullying in their schools, and witness peer bullying. They also think that bullying is usually caused by family problems. Based on this, it can be said that peer bullying has reached serious levels in schools and taking necessary precautions is an urgent necessity.

Secondly, it was found out that families and teachers agreed that children were mostly exposed to physical and verbal bullying. Based on the findings of the study, it can be said that physical bullying and verbal bullying is not underestimated.

According to another finding of the study, the families stated that the bully child mostly engages in bullying due to a lack of anger control, while teachers attributed bullying behaviour to family-related problems. Based on this, it is beneficial to highlight that negative role models within the child's family can be a triggering factor in the child's inability to control their anger.

These findings clearly highlight the importance of the family and the impact of family attitudes on an individual's inner world and behaviours. The influence of the family is significant in both a child's engagement in bullying and being exposed to bullying. It is necessary to promote awareness-raising efforts on how families can raise healthy and happy children across various areas of society.

The findings from the families revealed that children who were exposed to bullying are unwilling to socialize, refuse to go to school, experience sleep problems, and feel a lack of self-confidence, respectively. Teachers, on the other hand, indicated that the bullied child mostly experiences a lack of self-confidence, as well as unwillingness to socialize, refusing to go to school, and academic failure. It was concluded that teachers and families agreed on the symptoms shown by the child exposed to bullying.

Another finding reveals that the majority of families reported that their child has witnessed bullying and complained about it. In teachers' findings, on the other hand, it was concluded that students often witness bullying but remain silent. Families emphasized that bullying behaviour mostly stems from aggression, while teachers highlighted that the desire to be popular is the primary reason. In addition, unhappiness, jealousy, loneliness, and cruelty are cited as reasons of bullying behaviour. The vast majority of families and teachers have stated that assistance should be sought from the guidance service and the bully's families in order to prevent bullying.

An important result from the findings of both families and teachers in the study is related to the solution of bullying. It was observed that bullying is resolved at a relatively low rate. The findings indicate that families typically seek help from teachers, while teachers get help the guidance service and the bully's families to resolve the issue. In this context, it is a very difficult and long process for the family or teacher to resolve peer bullying. In schools without psychological and guidance counsellors, teachers and school administrators may be inadequate in solving unwanted student behaviours. School administration, families, teachers, guidance counsellors and psychological counsellors should cooperate in order to prevent peer bullying. In addition, the Ministry of National Education should initiate a study on peer bullying. Thus, a safer and more supportive educational environment can be created in schools.

Based on the findings, it appears that the school administration remains more passive in addressing this issue. Additionally, it is a striking and important result that, although it is rarely, bullying is resolved when either the bullying or the bullied child leaves the school. However, leaving the school will have a negative effect for both. Even though bullying children may feel powerful and superior, this behaviour can lead to a lack of empathy, which could result in more serious criminal

situations in the future. On the other hand, the bullied child will become more introverted and feel inadequate. Preventing bullying from an early age will help these children develop healthier psychological growth. Teachers have a great role in this regard. The reactions of the school administration and teachers to inappropriate behaviour in school are very important. It is important to evaluate the behaviours and situations fairly and set clear rules. The school's sanctions should also differ whether the bullying is physical or verbal. It is much more difficult for families to sanction bullying at school. The school's fair sanctions on peer bullying and its consistency in this regard will be effective in preventing peer bullying.

In conclusion, peer bullying creates various psychological effects on children. Peer bullying negatively affects the child's self-esteem and self-worth. Bullied children often face issues such as anxiety, low self-esteem, social isolation, and academic failure. Peer bullying may also arise some long-term effects such as problems in interpersonal relationships, lack of self-confidence, and traumatic experiences.

Bullying, which seriously affects our present and poses a threat to our future, should be addressed starting from the family, the cornerstone of society. If supportive efforts are also carried out across various parts of society, it can make a significant contribution to preventing major risk factors that prevent social development.

In this context, based on the results of the research, it is recommended that a psychologist should be assigned to schools, the number of guidance counsellors should be increased, trainings should be organized to raise awareness of families, children's use of social media should be limited, children should be directed to art and sports branches that they are interested in, teachers should observe and get to know students closely, and parents, teachers and guidance services should be in cooperation.

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ARTÍCULO DE INVESTIGACIÓN

Construir la propia identidad y la resiliencia social en espacios de género

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Resumen. Este estudio examina cómo los programas estructurados de autoentrenamiento físico contribuyen al desarrollo de la resiliencia, la identidad y la adaptación social entre cadetes femeninas en instituciones dominadas por hombres. Mediante la integración de métodos de fitness basados en Crossfit dentro de las academias de las fuerzas del orden, la investigación evalúa cómo un entrenamiento consistente y sensible al género mejora no sólo la resistencia física y la fuerza, sino también la preparación psicológica y la integración social. Los resultados demuestran que el autoentrenamiento físico desempeña un papel fundamental a la hora de mitigar la presión institucional, reforzar la cohesión del grupo y favorecer el equilibrio emocional en un entorno de alta exigencia. El enfoque de género adoptado en el estudio aborda los desequilibrios sistémicos y propone un marco sostenible para mejorar la adaptación social, la afirmación de la identidad y el bienestar en el contexto de la cultura de formación de las fuerzas del orden.

Palabras clave: academias MIA, cadetes femeninas, entrenamiento físico profesional, resistencia física general, resistencia de fuerza y velocidad.

Building self identity and social resilience in gendered spaces

Abstract. This study examines how structured physical self-training programs contribute to the development of resilience, identity, and social adaptation among female cadets in male-dominated institutions. By integrating Crossfit-based fitness methods within law enforcement academies, the research evaluates how consistent and gender-responsive training improves not only physical endurance and strength but also psychological readiness and social integration. The findings demonstrate that physical self-practice plays a pivotal role in mitigating institutional pressure, reinforcing group cohesion, and supporting emotional balance in a high-demand environment. The gender approach adopted in the study addresses systemic imbalances and proposes a sustainable framework for improving social adaptation, identity affirmation, and well-being in the context of law enforcement training culture.

Key words: MIA academies, female cadets, professional physical training, general physical endurance, strength and speed endurance.

INTRODUCTION

A personnel training for law enforcement agencies in educational institutions is mainly based on principles of masculinity mostly focused on male students' specific characteristics. An educational process in those institutions is organized in the same way as in civil higher education institutions; however, there can be observed such differences as a more strict routine and a focus on physical and psychological training of cadets (Makeeva et al., 2018a; Aniskova, 2020; Makeeva et al., 2020; Panova et al., 2024). Modern research in the field considers two approaches, such as a gender-role approach and a gender approach. The gender-role approach contributes to gender distinction: activities are divided between male and female, whereas the gender approach aims at adapting the educational system in accordance with psychological differences between male and female, as well as introducing new means and methods leading to the physical fitness improvement based on individual characteristics of a person (Grier et al., 2015; Kim & Gerber, 2019; Shmeleva et al., 2019; Raspopova et al., 2020; Panova et al., 2021). Besides, regular monitoring and assessment of the results with the psychological support of professors helps to discover problems and adjust the educational approach as well as to solve successfully adaptation problems caused by stress emerging during the educational physical training process (Voloskov & Voloskov, 2017; Kodzokov, 2018; Bonkalo et al., 2021; Kustov & Dudchik, 2021).

Due to the fact that the first approach has the priority at the stage of professional activity but not at the stage of professional training, our primary concern is the gender approach, which can help influence social norms and cultural values as well as health and wellbeing, create equitable and judicious conditions of individual fulfillment regardless of the gender, this approach also allows us to shape certain patterns of behavior, to meet expectations, to give opportunities, to design programs which address needs and interests of the most vulnerable gender-based groups, in our case – female, who are physically weaker than male due to anatomical and physiological features of the female body.

In the process of professional adaptation of female cadets in the MIA academies two main aspects are considered: adaptation to the service and to the educational process, since training condi-

tions in the predominantly male environment do not meet expectations of female cadets, on the one hand, and those of the educational institutions, on the other hand (Kuznetsova, 2016; Makeeva et al., 2018b). This is particularly true for physical training issues which have a significant impact on the professional readiness of future MIA employees. Therefore, the search for appropriate training methods and techniques supplementing the core physical training program is an urgent task and requires a complex approach which takes into consideration female morphological and functional capabilities (Makeeva et al., 2020; Kustov & Dudchik, 2021).

As for the adaptation of educational standards and requirements to the level which corresponds to real female capabilities, they are set by the Ministry and followed by universities. Nevertheless, unlike civil universities where the physical training requirements are set once and are not changed annually, in MIA academies the requirements rise progressively from year to year which create hardships especially for female cadets. One of the reasons is the fact that female physical maturity is reached by the age of 16–18 and is accompanied by the completion of growth and other aspects which can provide a successful improvement of physical training. Meanwhile, psychological and emotional development can continue and vary due to individual characteristics. Besides, slowing down of natural processes of physical development gives precedence to such a training system which can contribute to the increase in physical readiness for work and a relevant approach leading to the achievement of such a goal as: an individual training program in accordance with physical capabilities and needs which can guarantee more comfortable conditions for education (Haddock et al., 2016; Ukrainsky & Vlasenko, 2017; Panova et al., 2021).

The **objective** of the proposed physical self-training program is to improve the physical fitness of female cadets by means of crossfit performing in the process of physical self-practice within the whole period of studying in the academy.

METHODS AND ORGANIZATION OF THE RESEARCH

The goal was achieved by using fitness technology based on the Crossfit techniques implemented by female cadets in the process of self-practice supported by trainers counseling. The assessment of the result dynamics was carried out by tests such as 1000 m running, shuttle run, complex strength exercise (COE).

In the experiment a group of female cadets (18 people), specializing in “Law enforcement, training profile – Traffic police”, and a reference group of cadets (18 people), specializing in “Law enforcement, training profile – Investigation”, have participated.

The experimental group training process was based on the program including crossfit techniques such as cardiovascular exercises, basic strength exercises from weightlifting and gymnastics, as well as some exercises from martial arts practice.

RESULTS AND DISCUSSION

The tests results were processed by statistical analysis methods using the StatTechv. 4.8.0 (developer — “Statech”, LLC, Russia). The quantitative indicators were evaluated for compliance with normal distribution using the Shapiro–Wilk test.

The quantitative indicators, whose sample distribution was consistent with normal rates, were described by means of arithmetic averages (M) and standard deviations (SD). Limits of 95% confidence interval (95% DI) were given as a representativeness measure for the average values.

In the absence of normal distribution, quantitative data were described by means of median (Me) and lower and upper quartiles (Q1 – Q3).

One-way analysis of variance with repeated measurements was used to compare three or more related groups on a basis of a normally distributed quantitative sign. The statistical significance of changes in the indicator in dynamics was estimated by Fischer's F. The posteriori analysis was carried out using the pair Student's t-test with Holm's correction.

The non-parametric Friedman's test with a posteriori comparison by means of the Conover-Iman's test with Holm's correction was used to compare three or more dependent samples, whose distribution was different from normal. Differences were considered statistically significant at $p < 0,05$. 1000 m running shows the body's ability to resist fatigue when performing the proposed workload, thereby participating in the regulation of metabolic processes, involving large and small muscle groups, strengthening joints and ligaments.

The result dynamics of female cadets' tests in 1000 m running, speed and strength endurance is presented in Tables 1, 2 and 3, both for the experimental and reference groups.

TABLE 1. Comparative analysis of the 1000 m running dynamics between the experimental and reference groups during the training period

Groups	Testing stages							
	Year 1, semester 2		Year 2, semester 4		Year 3, semester 6		Year 4, semester 8	
	Me	Q ₁ – Q ₃	Me	Q ₁ – Q ₃	Me	Q ₁ – Q ₃	Me	Q ₁ – Q ₃
Experimental (n=18)	4,34	4,25 – 4,41	4,22	4,16 – 4,29	4,09	4,02 – 4,15	4,08	3,99 – 4,11
Reference (n=18)	4,30	4,25 – 4,34	4,17	4,15 – 4,22	4,11	4,04 – 4,18	4,12	4,05 – 4,18

A dynamics analysis of the female cadets' results in the experimental group in the 1000 m running based on the Friedman's test shows statistically significant changes ($p < 0,001$). Analysis by years has shown that the group has had a positive dynamics of the results, which corresponds to the requirements of the academy. Meanwhile, the increase in the results of the second year of study compared to that one of the first year constitutes 2,76% with a quartile spread from 4,25 to 4,4 (at $p = 0,039$). The third year dynamics compared to the second year makes up 3,08% with the spread from 4,16 to 4,29, and the fourth year dynamics compared to the third year makes up 0,2% with the spread 4,02 – 4,15.

Despite the fact that in Year 4 the increase is minimal, the spread of the results between the cadets has decreased significantly, which indicates an increase in their homogeneity within the group 4,02 – 4,15.

A dynamics analysis of the results related to the baseline (year 1, semester 2) shows statistically significant differences at $p < 0,001$ for year 3 semester 4 and year 4 semester 8. Thus, the physical

condition of female cadets shows a steady trend of improvement of the running time from year to year at all stages of observation.

In the reference group the change has also shown statistically significant changes at all stages of observation. However, in the experimental group a more pronounced and stable dynamics of improvement in the running results compared to the reference group can be observed. In particular, the median in the experimental group has decreased significantly at all stages of the experiment. This may indicate more effective training methods, including the use of Crossfit techniques in the self-training process of female cadets in the experimental group.

Performing the 10x10 shuttle run is a way of evaluating the development of the complex physical qualities: leg muscles strength when running, coordination and sense of balance when changing direction of movement, maintaining speed within the 10 m section, and high-speed endurance when being repeated multiple times.

In shuttle running, which reflects the level of speed endurance, the experimental and reference group dynamics is characterized by statistically significant changes ($p < 0.001$) according to the Fisher's test with repeated measurements. The comparative analysis between the groups presented in the Table 2 shows statistically significant differences between them in favour of the experimental group. The group has shown a significant decrease of time taken to complete the test in the second and fourth stages of training compared with the reference group.

TABLE 2. Comparative analysis of the speed endurance dynamics between the experimental and reference groups during the training period

Groups	Year 1, semester 2	Year 2, semester 4	Year 3, semester 6	Year 4, semester 8
Experimental	28,61 $\pm$ 0,30	28,42 $\pm$ 0,32	28,21 $\pm$ 0,31	27,95 $\pm$ 0,29
Reference	28,66 $\pm$ 0,50	28,47 $\pm$ 0,29	28,19 $\pm$ 0,53	28,24 $\pm$ 0,39
p	p > 0,05	p > 0,05	p > 0,05	p < 0,05

Although the experimental group has shown worse results in Year 3 than the reference group, the total group data are more positive, which indicates a lower standard deviation rate in the experimental group.

The use of complex strength exercise in physical training allows us to combine various types of physical workload in one exercise, which characterizes the level of development of different groups of muscles, whereas performing tasks without interruption causes active cardiovascular and respiratory system reaction. Therefore, this test is used as a check-up exercise in assessing the overall level of physical readiness for professional activity.

The analysis of complex strength exercise has shown dynamics in the experimental group results with statistically significant changes ($p < 0,001$) based on Fisher's test with repeated measurements. The results analysis in the reference group has shown statistically significant changes ($p = 0,001$) according to Friedman's test. The comparative analysis of the results between the groups is presented in the Table 3.

TABLE 3. Comparative analysis of the strength endurance dynamics between the experimental and reference groups during the training period

Groups	Year 1, semester 2	Year 2, semester 4	Year 3, semester 6	Year 4, semester 8
Experimental	31,72 ± 1,81	32,39 ± 1,85	34,05 ± 1,43	35,27 ± 1,84
Reference	31,83 ± 2,61	33,05 ± 1,55	34 ± 2,08	33,56 ± 1,38
p	p > 0,05	p > 0,05	p > 0,05	p < 0,01

Performed analysis indicates a growing dynamics of results in the experimental group and an unsustainable trend with a broad spread of results in the reference group. Taking into account the fact that the female cadets' level of physical fitness is higher comparing with the level of female civil university students, it is a difficult task to achieve the result growth. However, physical training is a key point for future female employees in law enforcement agencies in the perspective. Therefore, the analysis of the obtained data has highlighted the need not only for physical training as a part of cadets' educational program (4 hours a week), but also for systematical practice during the whole academic year as well as the entire period of study. In addition, a competent approach to physical training is vital for successful performance of professional duties and healthcare in the long run.

Our previous research indicates that systematic physical training leads to saving in the functioning of the cardiovascular system, reduction of mental energy expenditure (Makeeva et al., 2018b). But the crucial part of our research is a broader aspect revealing the professional significance of systematic exercise and especially self-practicing for a future MIA employee as far as it plays an important social (corresponding to the demands of the society), diagnostic (highlighting strength and weaknesses of the physical fitness), developmental (motivating activity) and educational (positive approach to healthcare) role (Osipov et al., 2017; Kyröläinen et al., 2018; Main et al., 2023).

CONCLUSION

Generally, the growth in endurance rates in the groups studied might be considered as positive dynamics. At the same time in the experimental group the dynamics observed has had a more significant impact in the perspective of the efficient professional activity on such thing as an increased level of activity and readiness for work, which in its turn leads to the ergothropic effect of the proposed physical workload, which enhances metabolism and increases efficiency as well as contributes to a more successful adaptation to the environment, including service activities. In addition, the proposed workload was performed in accordance with female cadets' capabilities without any psychological pressure increasing motivation to the systematic exercise. And hence in this regard the achieved physical fitness meets not only the female cadets' needs but also corresponds to the requirements as well as provides the basis of personality structure formation according to the requirements of professional activity.

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INTERACCIÓN Y PERSPECTIVA

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ARTÍCULO DE INVESTIGACIÓN

La influencia del dimorfismo sexual en el procesamiento cognitivo y la adaptación social

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Resumen. Este estudio examina el impacto del dimorfismo sexual en las capacidades cognitivas y la inteligencia social en adolescentes y estudiantes universitarios. La investigación emplea un enfoque de método mixto, integrando pruebas cognitivas (anagrama, generalización, autoevaluación) y evaluaciones de inteligencia social (labilidad intelectual, motivación para la autoevaluación). Los hallazgos revelan que mientras que los estudiantes varones demuestran una mayor adaptabilidad en las interacciones sociales, las estudiantes mujeres exhiben mayores niveles de iniciativa e inteligencia social autopercibida. La estabilidad emocional juega un papel crucial en el rendimiento cognitivo, ya que los estudiantes que experimentan malestar emocional muestran una menor eficiencia cognitiva. Estos resultados resaltan la necesidad de incorporar un entrenamiento cognitivo y de inteligencia social específico para cada género en los marcos educativos para fomentar un desarrollo personal y profesional equilibrado. Al comprender la interacción entre las habilidades cognitivas, la inteligencia social y el dimorfismo sexual, este estudio proporciona información valiosa para dar forma a las políticas educativas que apoyan tanto el crecimiento individual como el progreso social.

Palabras clave: dimorfismo sexual, cognición, inteligencia social, educación, diferencias de género.

The influence of sexual dimorphism on cognitive processing and social adaptation

Abstract. This study examines the impact of sexual dimorphism on cognitive abilities and social intelligence in adolescents and university students. The research employs a mixed-method approach, integrating cognitive tests (anagram, generalization, self-assessment) and social intelligence evaluations (intellectual lability, motivation for self-assessment). The findings reveal that while male students demonstrate greater adaptability in social interactions, female students exhibit higher levels of initiative and self-perceived social intelligence. Emotional stability plays a crucial role in cognitive performance, with students experiencing emotional distress showing lower cognitive efficiency. These results highlight the need to incorporate gender-specific cognitive and social intelligence training into educational frameworks to foster balanced personal and professional development. By understanding the interplay between cognitive skills, social intelligence, and sexual dimorphism, this study provides valuable insights for shaping educational policies that support both individual growth and societal progress.

Key words: sexual dimorphism, cognition, social intelligence, education, gender differences.

INTRODUCTION

The article first of all mentions the justification of the manifestation of sexual dimorphism in the human species. It is clear that the problem was first proposed by Ch. Darwin. Later, in the research conducted in psychology, interest was shown whether the biological signs of sexual dimorphism are also present in the psyche. Freud (1998) (psychological gender), Miller (2000) (intelligence indicators), (psychological characteristics of personality), Fellmann, Redolfi (2017) (gender), and others addressed the problem. It is clarified by researchers in different directions.

Researches like Alizade (2009) Aliyev (2006), Kulakoğlu Dilek & Topaloğlu (2017), Obozov & Timoshenko (2008), Pashchenko (2003) justify the importance of taking into account the signs of gender differences in boys and girls in educational psychology. The manifestation of sexual dimorphism in behavior and functioning, more specifically in cognitive skills and social intelligence, is widely investigated. The cognitive nature of sexual dimorphism, Eysenck (1995), Guilford (1965) and others. was the subject of his research. Signs of sexual dimorphism in adolescents are clarified in the explanations of Craig & Baucum (2005), Saulina (2015) and Amrahli (2018). Goleman (2007) explains the psychological nature of social intelligence. Signs of dimorphism in students' social intelligence are explained by Fellmann & Redolfi (2017), Moshkina (2000), Poryadina (2007), Yermontayeva (2014).

If the qualities characteristic of cognition and socio-emotional intelligence, which are required of a modern personality by gender, and which occupy an important place in his psychological portrait, are determined, then a conceptual model of the development of those qualities in the educational system can be developed. Based on this model, taking into account the laws of sexual dimorphism in family relations and social activities, practical ways can be developed to prepare the young generation for family life and direct them to social activity.

METHODOLOGY

In the study, the methods designed for the study of the cognitive field and social intelligence were used. They include: "Anagram" psychological test-2011. Form "A" (A-2009.A), "Generalization -2010. Form -A" (O-2010.A), "Identification of cognitive abilities" test, "Self-evaluation" test, E.I. Rogov's "Identification of the feeling of fear" survey, M. Lüscher's "Color test", "Man in the rain" projective test, "Intellectual lability" test, "Diagnostics of motivation of self-assessment on the level of social intelligence in students". The research methodology includes theories, concepts and approaches about gender differences, cognitive, social-cognitive, social-emotional intelligence.

RESULTS AND DISCUSSION

Currently, human freedom is a priority issue, but there are a number of contradictions in this area. On the one hand, family relations are still treated with stereotypes and conservative thoughts, on the other hand, the laws of sexual dimorphism are not taken into account. A youth that does not come to terms with this reality, believes that it is capable of everything and is determined to protect its rights is being formed. As a result, the family institution is rapidly disintegrating in the world. A number of typical problems are manifested in business relations in labor collectives. In order to clarify all this, there is a need to investigate the problem comprehensively and in specific areas.

The concept of "sexual dimorphism" in ancient Greek (δι- two νᾶ μορφή- form) refers to the anatomical differences between males and females of the same species (sex). In this regard, the signs of sexual dimorphism can manifest different characteristics to varying degrees. For example, these signs include the weight of males and females, strength and shape of chest, leg, arm muscles, body skin, facial hair, skin thickness, color, etc. belongs to.

Gender differences do not end there. As the organism develops, it begins to show itself with more specific signs in its internal structure, as well as in its constitution. This is demonstrably noticeable in some species, especially during mating season (mountain goats, elephants, deer, tetras and peacocks, etc.). The first source that talks about the dimorphism of sexual differences is Darwin's work "The Origin of Man" published in 1871 (The Descent of Man, 1871).

In this work, Darwin tries to apply the theory of evolution to the human species through sexual selection and selection. Focuses on how intelligence and moral abilities influence the choice of a sexual partner. In fact, at that time, Darwin wanted to develop the problem of relationships between different species by means of the newly formed anthropology. Therefore, he investigated the nature of sexual attraction in birds, insects, fish and mammals, and expressed his attitude to the cultures of sexual partnership in different human societies in this context. When explaining the characteristics of sexual dimorphism, Darwin was of the opinion that polygamous species have stronger sexual dimorphism.

Of course, both classical and modern researchers do not accept these ideas of Darwin. Oktay (2017) clarifies the attitude against Darwin's ideas as follows:

"The fact that men have more wives than women in the human species is not explained only by the fact that men are 15% larger than women. At the same time, since men have a large number of spermatozoa, they have an instinct to fertilize more females and get quality offspring. Females are interested in looking for the best male individual who will give quality offspring".

Currently, biology, genetics and psychology are studying sexual dimorphism within their subjects. Biology and genetics examines the problem of sexual dimorphism both in terms of signs that are present at birth and that become noticeable during puberty. In research, the factors that take place inside and shape the external appearance (constitution) are studied on the basis of biological, chemical, physiological processes and mechanisms. And we study the problem in the direction of psychology.

Many studies have been devoted to the psychological aspects of sexual dimorphism. Meanwhile, Freud's (1998) basic principles of psychoanalysis, Craig & Baucum's (2005) developmental psychology, Miller's (2000) gender differences in intelligence indicators, Alizade's (2009) sexual development of children and adolescents etc. we can show. In these studies, the differences manifested in the psychological structures of sexual dimorphism in different age periods, especially in the cognitive field (perception, memory, thinking, imagination, etc.), as well as in role behavior and other social structures of personality, are analyzed. In particular, the issues (gender) that are relevant for modern times in the role behavior in inter-gender relations are clarified.

Wide study of the psychological problems of sexual dimorphism begins with S. Freud. He explains the difference in the sexual characteristics of women and men and the psychology. From Freud's explanation, it seems that girls understand the first difference of sexual dimorphism (differences in sexual organs). This has a significant impact on character formation in girls. "As a result of this first broken dream in competition, they completely distance themselves from sexual life" (Freud, 1998: 45).

The difference in sexual organs is not the only sign that girls and boys perceive themselves as representatives of different sexes. These differences start from the end of preschool age, in their body structure, skin, hair, body fur, muscle strength, etc. It is also evident in the signs. Craig & Baucum (2005: 108) show that

"At the age of 9, girls are slightly lighter and shorter than boys, but then their growth rates increase dramatically due to hormonal changes that begin earlier than boys. It is known that sometimes there are boys and girls who lag behind their peers in terms of height and weight. These differences can affect the child's body image and general self-concept. This is an example of the interaction between physical, social and cognitive development processes".

Differences in the sexual dimorphism of girls and boys during adolescence are also recorded due to the general pace of development. A number of factors influence this. Even in the 19th century, the French philosopher Gabriel Compayré (1914: 130) noted about these issues that "The age of sexual maturity has a number of differences depending on climate, race, and individuality. In Rome, the age of puberty is defined as 12 (girls) - 14 (boys), in France 15 (girls) - 18 (boys)".

20th century researchers Craig & Baucum (2005: 567) included individual physiological structure, geographical area, culture, religion, etc. among those factors. point out: "In the USA, the average age of first menstruation in girls is about 12.5 years. Girls from the former Czechoslovakia had their first period at age 14. The median age for Kenya is 16, and for New Guinea it is 18 (Power et al., 1989)".

These authors show that sexual dimorphism is manifested not only in the biological system of girls and boys, but also in the psychological system: "The psychological factors associated with early sexual experience between men and women differ to some extent. Sexually experienced male adolescents have relatively high self-esteem. Teenage girls who have this kind of experience have lower self-esteem" (Craig & Baucum, 2005: 510).

Craig & Baucum (2005: 515) include the following in the signs of gender differences in intelligence and cognitive field:

- 1) “more efficient use of individual components of information processing, such as memory and memorization, as well as their application to other situations;
- 2) build more complex strategies for solving different types of problems;
- 3) master more effective ways of assimilation of information and symbolic memory;
- 4) to have a higher level of executive functions, including planning, decision-making, flexibility in choosing strategies from different scenarios”.

Alizade (2009: 69) explains the psycho-pedagogical aspects of the sexual dimorphism of adolescent girls and boys and the differences between them in both sexual, social and educational (cognitive) interests, mutual relations, social-gender clearly manifested in their roles:

“Interests are the needs, ideals, etc. of boys and girls. it is natural that there are certain gender differences between them in this field. The existing templates and stereotypes about boys’ and girls’, men’s and women’s games, professions, and art occupy the main place among the factors that determine the formation of gender differences in interests. The customs and traditions of the nature of boys and girls are also closely related to those templates and stereotypes”.

Apparently, sexual dimorphism is the appearance, structure, shape, color, weight, etc. in the biological nature of living beings. Is a concept related to signs. However, its manifestations are not limited to these. Just as biological and physiological systems are manifested in different structures of the psyche, sexual dimorphism is also manifested in a number of psychological signs and qualities. A number of facts have been collected in this field in the science of psychology. We have shown examples of sources related to a few of them above. However, there are still many issues that need to be clarified. Among them are the concepts of “social intelligence” and “cognitive skills”, which are more relevant now.

The concepts of “social intelligence” and “cognitive ability” express the priority problems of modern psychology. Both of these concepts include, on the one hand, human social skills, and on the other hand, problems that clarify the essence of conscious, deliberate and purposeful activity. If we include sexual dimorphism among the natural factors in the initial structure of these concepts, we create a general portrait of a person that is specific to both gender and social aspects of personality. If we have to express this portrait in an artistic language that everyone can understand, not in a scientific way, then the image of “Gacunda” (Mona Lisa) created by Leonardo da Vinci comes to life in our imagination. This psychological image, in which social qualities are combined with sexual dimorphism, is the “The Gioconda” phenomenon” that needs to be clarified for us. The question arises: “Why “The Gioconda”?

For centuries, art critics, psychologists, anthropologists, etc. the experts of the scientific fields are engaged in unraveling the secrets of the “The Gioconda” portrait, which is believed to have been created by Leonardo do Vinci in 1503-1517. Some of them “puzzle” about his smile, others about his facial features, others about his personality, the connection between the background and the figure, or the contradictions. In the latest information, there are possibilities that will surprise everyone:

“The prototype of the character is not only Lisa Gherardini, the wife of the Florentine silk merchant. Also the artist’s student and probably his lover is G.G. Caprotti, known by the pseudonym Salai. Kaprotti was a student of L.Vinci from 1490, when he was 10 years old. Working as his assistant for 20 years, he earned the nickname Salai and Little Devil. Joconda’s nose, forehead and smile are strikingly similar to other paintings in which Salain

is depicted. Among them are portraits of Yahya and an erotic painting called 'Angel in the Body'" (Oktay, 2017).

Of course, our intention is not at all to open a new direction in gender studies or to reject the reality of sexual dimorphism and follow the unanimous traditions in the formation of the male and female psyche. Especially, in the East, in the society where ethnic cultures still maintain their presence to a significant extent, doing so will not bring positive results. On the other hand, it is clear to everyone what these efforts will lead to.

Even at the end of the 19th century and the beginning of the 20th century, researchers predicted what their future families and future generations as a whole could face due to the improper establishment of sexual education in the development of adolescents. In the 21st century, these concerns are increasing. The most obvious statistics are families that break up early. Studies also show that the reason for this is some inappropriate information promoted under the name of "gender equality" contrary to the natural realities of sexual dimorphism.

In fact, under the concepts of "gender" and "feminism" we can ensure the vital interests of men who feminize themselves (feminization) and women who masculinize themselves (domestication), who do not accept sexual dimorphism firmly, who oppose their natural roles "without looking at the white and gray". We are looking for ways. If the boys and girls of the new generation are able to realize and actualize their personality by revealing their inner psychological resources on the natural-sexual characteristics given to them by nature, we think that they will not be inclined to rebel against their nature.

Regardless of gender, the most outstanding qualities for a modern person are those inherent to cognition (perception processes that take place in the brain of sensory signals until creating different types of images, images, frames, scenarios, etc.) and social-emotional intelligence. So, how are these qualities characteristic of cognitive structure and social intelligence formed, or should they be formed, in order to strengthen the family institution in the world and in our country?

The concept of "cognition" (lat. *cognitio*) includes all the possibilities of the field of understanding of personality. This concept is used to represent all processes related to the acquisition of knowledge. The term "cognition" was first used by E.R. Hilgard in his work "Consciousness in Modern Psychology". "The mental activity involved in the acquisition of cognition-knowledge, the functioning of the mind, expresses its importance" (Amrahli, 2018: 39).

Amrahli (2018) studied the characteristics of cognition in the cognitive activity of teenagers in the training process and came to a number of conclusions. It was determined that monitoring the manifestations of cognition in the training activities of teenage girls and boys gives the researcher conflicting information, because the leading activity of teenagers in this period is intimate-personal communication. In them, the training motivation weakens, the psyche focuses its energy more on self-search, self-determination and self-identification.

During adolescence, the psyche reaches such a level of development that they can have high cognition, characteristic of old age, and get opportunities to acquire social and emotional intelligence. On the one hand, sexual energy increases in the biological system during adolescence, creating a natural basis for activity. On the other hand, the internal psychological resources are enriched, the will-emotional capabilities of the cognitive field expand, but despite the social stimuli and demands they face both in the family and at school, the cognitive skills important for educational activities are still poorly formed in teenagers.

“Cognitive skill’ - the subject’s ability to accurately perceive and perceive sensory signals in cognitive activity, acting on previously acquired knowledge, skills and habits. it is to carry out actions, to come to a mental conclusion, to master the ability to perform actions” (Amrahli, 2016: 11).

Cognitive skills are not mechanically formed by themselves. Here, a number of emotional-volitional, as well as spiritual structures of the personality should be combined. If we diagnose the biological intelligence of adolescents, among the students who show high results, we can see those who have low academic performance and also exhibit undesirable behavior. On the contrary, among those whose intelligence is lower than them, there are students with high academic performance and social role behavior. The reason for this is, of course, the social factors that affect the interests of understanding the adolescent personality, as well as the learning motives. Therefore, for the formation of cognitive skills, the cognitive field, implicit knowledge, automated action, past habits and skills involved in this process should be directed to training goals and interests. Amrahli (2016: 16) notes that

“the formation of each new skill is actualized with the knowledge, skills and habits that are its basis.” In order for the skill to be more accurate and perfect, all the elements related to its construction are strengthened with gradual refinements and improvement of means”.

But, as we mentioned, teenagers are not able to take advantage of their potential in this area. Because their attention is directed to their inner world according to the demands created by the leading activity of the age.

In order to clarify whether the cognitive skills and cognitive activity of adolescents are correlated with gender dimorphism (gender-self), we conducted research in rural schools of Gakh region. We determined the contradictions between their summative grades, cognitive skills and self-evaluation levels based on the following criteria:

- 1) summative grade given by the teacher to the teenager according to cognitive skills;
- 2) scores on test results of cognitive skills of teenagers - expert evaluation;
- 3) self-assessment of the adolescent according to cognitive skills;
- 4) levels of test results of adolescents on scales.

At the initial stage, the academic grades, which are the main factor in determining the cognitive skills of teenagers, were determined based on the results of large summative tests. At the same time, a special methodology was developed and implemented to measure their general cognitive skills. We continued the research with the application of tests. We started this work with the “Anagram” test.

- 1) “Anagram” psychological test - 2011. Form “A” (A-2009.A)

Appointment. An anagram is an unintelligible word characterized by the displacement of letters, either intentionally or accidentally. The methodology is primarily intended for the detection of combination abilities, the sharpness of abstract-logical thinking. The results of the test also have a positive effect on the ability of the test takers to generalize and distinguish important signs, as well as to enrich the vocabulary.

- 2) Summary -2010. Form -A” (O-2010.A).

Appointment. One of the most important operations of cognitive activity is finding commonalities in things, various events, and specific concepts. The methodology allows to detect the cognitive abilities of the tested: This methodology is also intended for all cases aimed at learning verbal

intelligence. As a result, it is possible to determine the level of development of cognitive knowledge in teenagers and the ability to generalize this knowledge.

3) "Identification of cognitive abilities" test

Appointment. The test subjects are required to concentrate their attention at a high level, perceive sensor (sound) signals and perform the task based on them correctly. The process takes place on the basis of consistent, logical and coordinated execution of actions, as in cognitive activity. Most of the tested devices perform simple tasks in a short period of time (a few seconds). The results allow to diagnose the cognitive abilities of the subjects.

4) "Self-assessment" test.

Appointment. The self-assessment test is used to study teenagers' interest in educational activities, their cognitive abilities in this activity, the level of socialization and self-identification. In the questions asked, the pace of cognitive activity of teenagers, their interest in this activity, and their approach in terms of value are clarified. The obtained results are summarized in Tables 1 and 2.

TABLE 1. Levels of test scores of 14-year-olds

No.	Names and surnames of students	Levels on test scales				
		average price	anagram	generalization	cognitive abilities	self assessment
			0-2 Low 3-9 Average 10-12 Upper	0-16 Low 17-27 Average 28-40 Upper	0-25; 26-30 Low 31-35 Average 36-40 Upper	32-42 Low 43-64 Average 65-96 Upper
1.	Chalabiyeva A.	4,8	Upper	Average	Upper	Upper
2.	Ahmadov M.	3,0	Low	Low	Low	Upper
3.	Ahmadzade S.	4,8	Low	Average	Upper	Upper
4.	Hafizova M.	5,0	Upper	Upper	Upper	Upper
5.	Hafizov T.	4,6	Average	Average	Upper	Upper
6.	Hasanov T.	3,4	Upper	Average	Low	Upper
7.	Iskandarli A.	5,0	Upper	Average	Average	Upper
8.	Isayev R.	4,2	Upper	Average	Low	Upper
9.	Karakhova L.	5,0	Average	Average	Upper	Average
10.	Mammadzadeh S.	4,2	Upper	Average	Upper	Upper
11.	Osmanova R.	5,0	Average	Average	Upper	Upper
12.	Salmanov S.	3,0	Average	Average	Upper	Upper
13.	Sofiev H.	3,8	Average	Average	Upper	Upper
14.	Sharifova V.	3,0	Average	Average	Average	Average
15.	Tahirli T.	3,8	Average	Average	Average	Upper

As can be seen, the differences between the evaluations of 14-year-olds are clear. For example, the result of S. Ahmadzadeh, whose academic score is 4.8, is low on anagram, and average on generalization. Also, A. Isganderli, whose academic score is 5.0, has an average score on generalization and

cognitive abilities. Another remarkable difference can be seen in the result of M.Ahmədov. Although his academic GPA is 3.0, his self-esteem is high. A similar result was recorded in S. Salmanov. His academic grade is 3.0, and his cognitive abilities and self-assessment score are above.

TABLE 2. Levels of test results of 15-year-olds on scales

No.	Names and surnames of students	Levels on test scales				
		average sum-mative the price	anagram	generalization	cognitive abilities	self assessment
			0-2- Low 3-9 Average 10-12 Upper	0-16 Low 17-27 Average 28-40 Upper	26-30 Low 31-35 Average 36-40 Upper	32-42 low 43-64 Average 65-96 Upper
1.	Asafova Ü.	3,0	Upper	Average	Average	Low
2.	Alieva Q.	4,4	Upper	Low	Average	Upper
3.	Alizade X.	3,6	Upper	Average	Average	Average
4.	Haydarov F.	4,2	Upper	Upper	Average	Upper
5.	İsgenderli N.	3,8	Upper	Average	Low	Upper
6.	Qazakhov R.	3,2	Upper	Upper	Average	Average
7.	Mehsimov V.	3,0	Upper	Upper	Upper	Upper
8.	Mehsimova V.	3,2	Upper	Upper	Average	Average
9.	Memmedova L.	4,4	Upper	Upper	Average	Average
10.	Nasirov R.	4,4	Upper	Upper	Average	Upper
11.	Sadıgov F.	3,2	Upper	Average	Average	Average
12.	Sofiev E.	3,8	Upper	Upper	Average	Upper
13.	Sofieva V.	4,4	Upper	Upper	Upper	Upper
14.	Sharifov M.	2,8	Upper	Low	Average	Upper
15.	Shirinov R.	2,8	Average	Low	Average	Average

Although the 15-year-olds solved the puzzle correctly compared to the 14-year-olds, the generalization and cognitive skills test results, as well as self-esteem, were lower. In this class too (IX “a”) the prices of only 2 person - V. Sofiyeva and R. Sirinov - were adequate to each other. There are also contradictions between the evaluations of other teenagers. There were also teenagers whose academic grades were sufficient (M. Sharifov, V. Mahsimov) but their self-esteem was high. Or on the contrary, some teenagers rated themselves as average even though their academic grades were high (Kh. Alizade, L. Mammadova).

In this study, it was determined that the cognitive problems of adolescents with weak cognitive interests are also related to their character accentuation. These cases were 21% higher in poor readers compared to well-read teenagers. Dependencies between the percentage indicators of emotional problems and cognitive abilities were determined. It has become clear that the higher the cognitive ability of teenagers, the higher their ability to overcome their emotional difficulties. The reason is the close participation of cognitive structures in the regulation of the emotional state. Thus, the emotional tension of teenagers with poor cognitive abilities was 28% higher than that of good readers. Arousal is 31% higher in adolescents who are poor readers.

The following characteristics were identified as the cause of emotional instability in adolescents with weak cognitive abilities:

- not being able to analyze one's own actions internally, to plan, to build a strategy;
- not being able to analyze situations rationally and draw correct conclusions;
- not being open to self-criticism and self-correction;
- high typological characteristics such as schizoidness, pedantry, demonstrativeness, meticulousness, etc.

The emotional sphere also has a significant impact on the cognitive activity of adolescents. Since the development of thinking, which is an important component of the cognitive field, is connected with the development of feelings and emotions, it is responsible for the associative relations of cognitive activity as a whole. During psychosomatic and affective disorders, these relationships are weakened or broken. In our research, we encountered such violations in 20-22% of teenagers. The more common form was emotional and cognitive (cognitive) disorders, each of which ultimately caused different types of difficulties for the cognitive activity of adolescents.

The projective methods we applied to study the emotional-cognitive state of teenagers also allowed us to obtain interesting information. According to the results, emotional tensions were recorded in 20-22% of teenagers. The most frequent form of them is indifference, boredom, and the search for additional entertainment in students in an uninteresting learning environment (talking on the phone and other electronic devices, doing another lesson, talking to a friend, looking out the window and dreaming diving, sleeping on one's elbows at the desk, arguing with the teacher, etc.), as well as excitement, confusion, shyness, anger, fear of threats, etc. were situations.

As a result, each of these emotional situations creates different characteristic difficulties for the cognitive activity of young people. The situation becomes even more problematic in situations where training is organized without motivation, without clarifying the problem, without making assumptions and conducting research. On the contrary, in the educational process established by interactive and creative methods, comfort, security, initiative were created in their emotional field, the desire to ask questions, join discussions, search for solutions to problems, prove the correctness of their ideas and achieve goals arose. All this was reflected in the activity of the students. In the study, such situations were partially recorded in classes V (10-11 years old) and VIII (13-14 years old).

In the research, we used E.I. Rogov's questionnaire to determine the feeling of fear in V and XI grades, M. Lüscher's color test" and "Man in the rain" projective test to find out whether the emotional state of teenagers changes due to natural characteristics or training situations. The methods were used by classes as follows:

Grades V-VI: E.I. Rogov - questionnaire on determining the feeling of fear;

Grades VII-VIII: "M. Lüscher's color test";

Grades XI: "Man in the rain" projective test.

Another analysis was conducted on the basis of independent creative works of teenagers. We asked them to create a visual representation of the road that goes outside of the area where they live, for example, to the district center. In this task, clear differences in sexual dimorphism were already revealed. The girls described the road and the objects on its side more precisely (with their names).

Some of them placed additional images on the picture. However, the objectivity in the pictures taken by the boys was more than that of the girls. The analysis allowed us to determine:

- the facts presented in the emotional background during the training process increase the level of sensitivity of teenagers, they are perceived and remembered more quickly;
- the correlation between the emotional state of teenagers and educational success is difficult, the state of the cognitive field of students who achieve high success in education is not at all adequate to these successes;
- there is a dependence between the emotional state of adolescents and the regulation of cognitive activity, the more stable and stable they are from an emotional point of view, the more confident they are in their suitability for their social (including sexual) role, the more appropriate it is to regulate cognitive activity. it becomes so easy.

Also, it was determined that the dependence of the cognitive activity of teenagers on the emotional field in the training process is that weak readers have incompleteness in the value-motivational field of personality and delays in the development of needs. These occur for the following reasons:

- weak inclination, demand and interests, which are the main factors of cognitive activity;
- insufficient development of the emotional sphere due to psychological age, difficulties in preventing distress and excitement while performing tasks;
- symptoms of impatience, denial, disagreement, stubbornness arising in the affective field, difficulties in perceiving and recognizing new materials, choosing and differentiating the necessary ones;
- inadequacy of self-evaluation and social evaluations.

It can be concluded that it is difficult to say that sexual dimorphism prevailed in all adolescents in the differences found in personality and cognitive indicators during adolescence (especially at the age of 13-15). The main factor here is the “Jakonda feomeni” - the realization of vital motives and goals in internal and external activities. However, for this realization, in addition to individual opportunities, there should be an environment that will stimulate their manifestation. If there are no significant differences in the cognitive skills of teenagers, or not much, then it is possible to do the following:

- 1) in the sexual education of adolescents, to educate them about the cognitive capabilities specific to their gender;
- 2) to form a cognitive base for their future career by forming cognitive skills;
- 3) prepare the ground for them to conduct family planning in a more rational way in the future;
- 4) preparing a “psychological portrait of a modern personality” and including the qualities characteristic of cognition and social-emotional intelligence in its features, introducing teenagers of both sexes to this portrait;
- 5) to create a favorable environment for teenagers to develop personality indicators corresponding to this portrait.

Now let's pay attention to the differences of sexual dimorphism in the content of social intelligence in students at an older age. For this, we conducted the “Intellectual lability” test with 94 students (47 boys, 47 girls) studying in different specialties in the first year. According to the char-

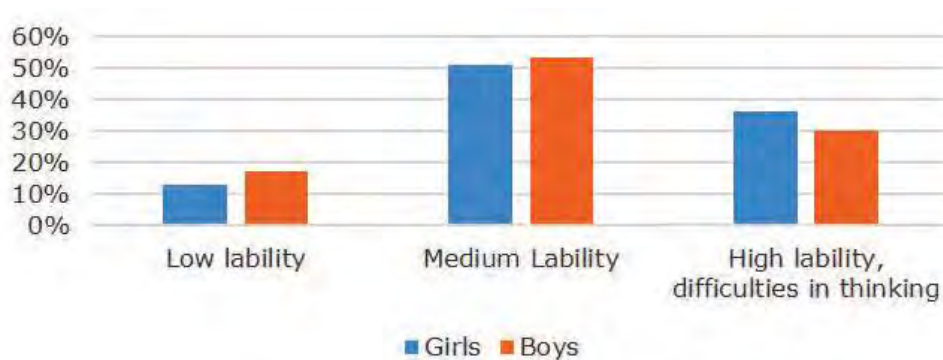
acteristics of the methodology, in terms of the structure of the intellect, the area that is more clarified here is attention, perception, understanding, analysis-synthesis processes of thinking, as well as aspects related to the social nature of the intellect.

TABLE 3. Results on the intellectual lability test

Levels of lability	Results				Results	
	Girls		Boys		Number	Percentage
	Number	Percentage	Number	Percentage		
0- 4 mistake: low lability	6	13	8	17	14	15
5-9 mistake: average lability	24	51	25	53	48	51
10-14 mistake: upper lability	17	36	14	30	32	34
15 or more mistakes: intellectual retardation	0	0	0	0	0	0

According to the results, 13% of 47 students in the group of girls and 17% in the group of boys have low intellectual lability. That is, their intellect has stable and stable qualities. This means an indicator close to the upper limit of intelligence and social intelligence capabilities. On this level, the indicator of the boys' group is 4% higher than the girls'. The average lability is 51% in the group of girls and 53% in the group of boys. Higher lability (stability) and thinking difficulties are also 6% more common in girls than in boys.

Figure 1. Gender differences in intellectual lability

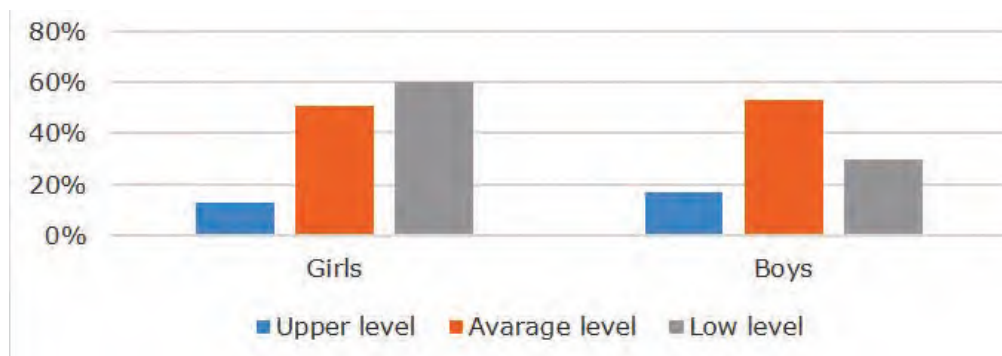


These results are consistent with the psychological and biological facts of sexual dimorphism in thinking. So, according to the laws of sexual dimorphism, boys have more opportunities to acquire social intelligence from a natural point of view. We also correlated these results with the results of the social intelligence test we conducted with those students. For this, we used the methodology "Diagnosis of motivation of self-evaluation on the level of social intelligence in students" modified by D. Marlow and D. Crown. "Diagnostics of motivation of self-assessment according to the level of social intelligence in students". Purpose: to evaluate the correctness of the statements by studying the answers given by the students regarding their social intelligence.

TABLE 4. Self-assessment on the level of social intelligence the results of motivation

Levels of social intelligence	Results				Results	
	Girls		Boys		Number	Percentage
	Number	Percentage	Number	Percentage		
15-20 points: upper level	11	23	9	19	20	21
8- 14 points: average level	24	51	23	49	47	50
0-7 points: low level	12	26	15	32	27	29
	47 n.	100	47 n.	100	94 n.	100

The fourth table shows the self-assessment indicators of social intelligence in male and female students studying in the first year. Apparently, in general results, girls have higher and average social intelligence scores than boys. At least, girls think so. According to the general results, only 29% of students are low. However, this indicator was 34% of intelligence labile. So are the separate results for girls and boys on basic intelligence. The upper lability of intelligence was 36% in girls and 30% in boys. However, the same indicator for social intelligence is 26% for girls and 32% for boys. That is, the differences between basic and social intelligence of girls and boys are clearly visible. This result suggests that in modern times, girls value themselves better in terms of social activity, they show more initiative to achieve this. Their academic results also prove this.

Figure 2. Correlation of intelligence levels of girls and boys

Of course, we can make as many comparisons as we want. Our goal is to dissuade teenagers and young people, who will represent the future generations in modern conditions, from rejecting the characteristics of their gender, rebelling against it, choosing ways that are alien to social norms, and showing the ways of forming the qualities that are characteristic of the personality of a modern person based on natural opportunities.

Sexual dimorphism is inevitable. It is a law of nature, but it is possible to form new qualities on sexual characteristics. The principles, methods and technologies of modern psychological science allow this. It remains for us to revive Leonardo da Vinci's *Jaconda* at the junction of modern social sciences about man, to give it a new life, a new breath. Our research is still ongoing. We will get more accurate and interesting facts in the future studies we will conduct on the effect of sexual dimorphism on interpersonal relationships in the family.

CONCLUSION

Research results Miller's (2000) (Sexual selection for indicators of intelligence) sexual selection in intelligence indicators, Pashchenko's (2003) cognitive and psychosocial features of social intelligence in early adulthood, Poryadina's (2007) gender differences in the structure of social intelligence of young, Saulina's (2015) characteristics of sexual dimorphism of cognitive abilities of adolescents with a high level of intelligence and coincides with the results of studies conducted by such researchers. At the same time, there are differences in the results. The difference is that we approach the problem not from the context of sexual dimorphism and social intelligence, or from the context of sexual dimorphism and cognition, but rather from the context of cognition, social intelligence, and sexual dimorphism. In the results of E.I. Pashchenko, the scope of the work carried out in this direction is wider, as in the issues studied by us, but cultural differences are evident in the results. On the other hand, in our study, the issue is considered in the dynamics of psychological age development. The sexual dimorphism of the manifestation of cognitive skills formed in adolescence at the level of social intelligence in youth is compared.

The facts obtained in the research and yet to be obtained can help us to strengthen the institution of the family. Because the awareness of both parties about the manifestation of sexual dimorphism in cognition, as well as in social and emotional intelligence, can help to regulate mutual relations in the family, as well as in the fields of work, in more civilized ways. The article provides information on the issues investigated in this direction and indicates directions for future research. On the one hand, based on the obtained scientific results, it will give a "green light" to the Upperic of "premarital dating", which has been taboo in the East for centuries, and will allow us to go down to its deep layers, which are important for the family. On the other hand, without accepting sexual dimorphism, the harmful consequences of going against one's own gender role on the basis of gender equality in the family are justified. Psychological problems, which have become the main factor in divorces in recent years, causing difficulties in the regulation of family relations, will be clarified in more detail. The theoretical scientific base created for developing, promoting and applying the socio-psychological aspects of preparing young people for family life will be enriched.

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INTERACCIÓN Y PERSPECTIVA

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ARTÍCULO DE INVESTIGACIÓN

Dilema sobre las decisiones sobre el embarazo: un estudio de mujeres alfabetizadas

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Resumen. Este estudio examina el impacto del dimorfismo sexual en las capacidades cognitivas y la inteligencia social en adolescentes y estudiantes universitarios. La investigación emplea un enfoque de método mixto, integrando pruebas cognitivas (anagrama, generalización, autoevaluación) y evaluaciones de inteligencia social (labilidad intelectual, motivación para la autoevaluación). Los hallazgos revelan que mientras que los estudiantes varones demuestran una mayor adaptabilidad en las interacciones sociales, las estudiantes mujeres exhiben mayores niveles de iniciativa e inteligencia social autopercebida. La estabilidad emocional juega un papel crucial en el rendimiento cognitivo, ya que los estudiantes que experimentan malestar emocional muestran una menor eficiencia cognitiva. Estos resultados resaltan la necesidad de incorporar un entrenamiento cognitivo y de inteligencia social específico para cada género en los marcos educativos para fomentar un desarrollo personal y profesional equilibrado. Al comprender la interacción entre las habilidades cognitivas, la inteligencia social y el dimorfismo sexual, este estudio proporciona información valiosa para dar forma a las políticas educativas que apoyan tanto el crecimiento individual como el progreso social.

Palabras clave: dimorfismo sexual, cognición, inteligencia social, educación, diferencias de género.

Quandary about pregnancy decisions: a study of literate women

abstract. Present study examine the dilemma of unwanted and unhappy pregnancy faced by literate women of Pakistan. Existing literature highlights this problematic situation for women. However, there is a need to precisely categorize the different experience of women either they face unwanted pregnancy or unhappy pregnancy. Current study fills the literature gap from examining the causes and experiences of unwanted pregnancy and unhappy pregnancy. Moreover, illuminate on the unavoidable reasons for women to get pregnant neglecting their personal wish and health. Research employs the qualitative research design, 20 interviews were conducted from the target population of literate women. Findings reveal major cause to have unwanted pregnancy is the low rate of contraceptive use among married couples. People hesitate to abort their unplanned pregnancy because of their religious believes. Unhappy pregnancy greatly cause because of the wish for male child in family. Existing patriarchal system of Pakistan accelerates the desire for son among married couples. Parents feel pressure, particularly from their immediate family and from society as a whole. This lived experience violates women reproductive rights as results in critical physical and mental ailments. Pregnancy particularly salient conundrum as Pakistani women face immense pressure to meet with appraise of ingrained traditional gender roles and expectations. People more partial to have son in family owing to entrenched cultural and economic deliberation. Policies needed to be address on cultural grounds to avoid the violation of women reproductive rights. This study will help policy makers to ponder over the deep rooted reasons that are responsible for the insufficient implementation of women rights in Pakistan.

Key words: pregnancy decisions, women rights, economic deliberation literate women.

INTRODUCTION

Pregnancy seems to be happy phase in married life but it is not joyful when unwanted. Unhappy pregnancy results in mental issues like depression (Kitamura et al., 1993), woman who bear unwanted pregnancy may develop fear of child birth, medically diagnosed tokophobia (Take gata et al., 2018). Inadequate adjustment on psychological grounds is a negative reaction towards pregnancy (Ohashi et al, 2016). However, negative reaction towards pregnancy has two features, one is unwanted pregnancy in which woman face the pregnancy that is unplanned or unexpected. The other one is unhappy pregnancy in which woman is not happy with her pregnancy.

Reproductive rights are about the legitimate right to contraception, abortion, medical services for fertility treatment, reproductive wellbeing, and informed position about individual's reproductive body. Reproductive rights secure individuals' opportunity to make a choice about their body's abilities to (not) reproduce (Eriksson, 2021). Recently, the researches illustrated the present alarming situation about women reproductive issues in Pakistan (Memon et al., 2023; Shaheen et al., 2023; Ramzan, Nusrat & Arif, 2023; Malik et al., 2023). Unwanted pregnancy and unhappy pregnancy violates women reproductive rights. Reproductive rights permit women to meet with the features of empowerment as from rights practice they have control over their bodies and the decisions related

to their reproductive health (Tan et al., 2024). As, these rights has social and financial implications. Social institutions, family, politics and economy affect the practice of rights documented internationally (Asif & Pervaiz, 2021).

Global literature reflects the vulnerable conditions and ignored risk factors that diminish the development of the young population. High predominance of undesirable pregnancies, constrained childbearing, sexually transmitted infections, HIV, and hazardous fetus removals that portrays absence of information about sexuality and reproductive wellbeing among youths are noted in a globe (Mustapa, Ismail, Mohamad & Ibrahim, 2015). Teenagers represent 23% of the general weight of sickness due to pregnancy and labor (Patton et al., 2009). In developing countries, like Bangladesh, India and Pakistan, these rights are explained on the parameters of inequality, violation, subordination and marginalized gender schemas (Mehmood et al., 2022; Sattar, Ahmad & Asim, 2022). Saeed, Pillai and Gouher (2021) argued that reproductive rights knowledge and practice has strong association. People of Pakistan has insufficient knowledge about women reproductive rights. However, they have low use of contraception for fertility control.

The focus of the international community is on individual needs, women empowerment, and the criterion of a developing debate about the relationship between human rights and health. Pakistan signatory to Universal declaration of human rights which aims to regulate women reproductive health issues for the sake of overall women development and well-being (Sajjad, 2023). Despite this, women in Pakistan seem to be depriving from their basic rights on their own body. Susan Papp, managing director of policy and advocacy department of Women Deliver in 2019 conference stated that in 2018, 214 million females in developing nations had a neglected requirement for present-day contraception, produce 67 million unplanned pregnancies, 23 million impromptu births, and 36 million women (about twice the population of New York) adopted different methods to end their pregnancy (Elizabeth, Diya and Saranzaya, 2019). Saeed (2012) stated that there is a strong prevalence of son preference in Pakistan.

Current study focus on the dilemma of unwanted and unhappy pregnancy which shed a light on the reasons behind this violation of women reproductive right. It violates the right to health and right to take decisions about their own body. The research question of current study explores the multidimensional facets that act as responsible behind the practice of unwanted and unhappy pregnancy among literate women of Pakistan. This study is significant as women share their lived experiences and demonstrate how these negative event of their lives intersects with empowerment status in terms of physical as well as psychological matters. The manifest and latent consequences influencing on women well-being as a whole. However, this study helps the reader to differentiate between unwanted and unhappy pregnancy, as they have divergent in lived experience as well as pose different reasons of happening.

THEORETICAL APPROACH

Self-efficacy, a concept introduced by Bandura (1977), refers to an individual's belief in their ability to perform a particular behavior or achieve a specific outcome. In the context of SRH, self-efficacy plays a crucial role in determining whether individuals can advocate for their own health, seek information and services, and make decisions aligned with their SRH needs (Bandura, 1977).

Empowerment is a value-oriented concept as well as a theoretical understanding of the efforts to control the decisions that ultimately influence one's life. The value orientation of empowerment underlies the aims of efforts to achieve goals and the strategies to implement social change in the community. The theoretical understanding demonstrates the procedure by which one exercises and exerts control over decisions and organizing a knowledge framework in this regard. Empowerment theory encompasses critical awareness and participation in efforts to achieve goals. At the community level, empowerment relies on successful efforts to improve the community's effectiveness to accomplish its goals. However, at an individual level, empowerment is calculated from one's control and participation over decisions of life (Zimmerman, 2000).

Mary Zimmerman define empowerment on different levels of analysis, according to that empowering developments at the individual level of analysis comprise practices to exercise control by involvement in decision-making or handling any bad situation in one's instant setting. This could be attained from side to side involvement in community organizations or events, being included in work-place administration groups, or gaining knowledge for novel skills. Progressions related to cognitive proficiency (e.g, decision-making), handling resources, or engaged in collective work to achieve mutual objective possibly will have empowering prospective (Zimmerman, 2000).

Yet another theory that complements the empowerment perspective is the Health Belief Model. The Health Belief Model (HBM) and Empowerment Theory form a synergistic relationship in the context of women's reproductive rights. As women become aware of their health risks (HBM's perceived susceptibility and severity), they are motivated to seek knowledge, which is an empowering act. Recognizing the benefits of exercising reproductive rights (HBM) increases motivation for empowerment in other life areas. The health belief model's key constructs - perceived susceptibility, perceived severity, perceived benefits, perceived barriers, cues to action, and self-efficacy - can be applied to understand how women in Pakistan perceive reproductive health issues and make decisions about their reproductive right (Green, Murphy & Gryboski: 2020). For example, women's perceived susceptibility to reproductive health problems, their perception of the severity of these issues, and their understanding of the benefits of exercising reproductive rights could influence their health-seeking behaviors. The HBM helps identify barriers to reproductive health practices, which can be addressed through targeted empowerment interventions. Conversely, empowerment alters health beliefs, leading to more proactive health behaviors and reduced perceived barriers. At the community level, empowerment creates social norms that serve as cues to action for reproductive health behaviors. This dynamic interplay between HBM and Empowerment Theory promotes better reproductive health outcomes for women.

Sexual and reproductive rights ensure the control of a woman on her own body and the denial in this regard indulges her in the position of exploitation and subordination. The empowerment of women in society significantly attached to her empowered position in social, economic, and political domains. The empowered position boosts up one's self-confidence and self-esteem that effects on whole life. The transferring power in Pakistani patriarchal society to empower women may demand structural changes including increase in education and job opportunities for women, boost up their health care services and shelters. The empowerment gives them power and control on their own life decisions. Therefore, this study selected the working as well as non-working women so that see their lived experience about their rights and also highlight their satisfaction on experiences. If, the working status, education make them empower to exercise their sexual and reproductive rights or other social determinants are more influence on their practices and knowledge. When a woman is empow-

ered, she can have control on her body and she can say no to sexual intercourse when not feeling comfortable to do so, no to unwanted pregnancy, take part in decision making about number and gap between children, utilization of contraception and new reproductive technologies if needed, accessibility and affordability of health care services, and having adequate knowledge in this regard.

Empowering women through rights practice has profound implications for societies and economies. Closing the gender gap in labor force participation and entrepreneurship can lead to substantial economic growth (World Bank, 2019). Additionally, women's empowerment is linked to improved health outcomes for women and children, as empowered women are more likely to seek healthcare and make informed decisions (Sen, 1990). Increased women's participation in political processes can contribute to political stability and peace (Hudson, 2005), and it can reduce gender-based disparities in income, education, and access to resources, promoting social equity (Kabeer, 2005). Challenges in promoting women's empowerment through rights practice persist. Gender-based violence, unequal pay, and underrepresentation in leadership roles are just a few examples. To address these challenges, future research and action should focus on recognizing intersectionality, promoting global partnerships, and enhancing gender education and awareness programs.

METHODS

Interpretative approach of qualitative research design has been used in this study. Explanatory approach employs intended to explicate the major causes behind the notorious reproductive issue of women. The qualitative approach was chosen for its suitability in understanding the unique perspectives of literate women of Pakistan, specifically those in their childbearing phase. 20 interviews were conducted with reproductive age (15-49) married women who are dwellers of the capital city, Islamabad, Pakistan.

The purposive sampling technique used in which face to face interviews served as getting firsthand information from target population related to the area of research. Questions were asked to explore lived experiences of women. Data categorize and explicit the unwanted and unhappy pregnancies. By examine the causes, multi-dimensional factors explained in this research endeavor. The flexible nature of the data collection method permits the researcher to get in-depth probing when respondents showed interest. When researchers ensure that comprehensive knowledge and understanding about the area of study achieved, the process of data collection stop.

Credibility was maintained through theoretical adequacy, method triangulation, and the use of verbatim accounts from interviews, while ethical considerations included informed consent, participant rights, and privacy protection. The information was filtered and clustered which help to establish themes. Thematic analyses helps to analyze and interpret the data. Quotes from the respondents mentioned to illuminate on the perspectives and understanding of the respondents alliance to research questions and objectives.

Cultural constraints inhabit Pakistani women for open discussions about their reproduction health and rights practice. Researchers build the comfort zone for participants. They were informed and ensure about the confidentiality of their live stories. The voluntary participation was also highly consider while women were interviewed who interestingly ready to answer the research questions.

FINDINGS AND DISCUSSION

Women rationality and entrenched social norms

Unwanted and unhappy pregnancies exist among educated people of Pakistan. From education, women become rational and have logical interpretations of their lived experiences. Women those have the live stories with their either unwanted or unplanned pregnancies have some reasons for this happening. For instance, the complex role of education in son preference is depicted in the patriarchal societies like Pakistan and can differ relying upon different factors like social standards, financial status, and opportunities to education.

Women educational achievements can prompt expanded familiarity with women rights discourse. Educated people are bound to challenge customary orientation standards, including the inclination for male children, and support the arguments for gender equity inside their families and networks. Despite the increased awareness in educated females, they face son preference and unwanted pregnancies attach to son preference because of the complex social fabric that ultimately support son preference in society. Respondent shares her experience as, although, my parents give higher education to me, but the life decision like mate selection was in their hand. After marriage, my family planning decisions are in my mother-in-law's hand. Unfortunately, education only give awareness of rights but the practices are in family's hand.

The educational achievements give women awareness about their rights but when they claim their rights and society doesn't responded positive then they face depression and stress. As they feel helpless in front of their societal norms and values. Especially, the depression is the result of unhappy pregnancy when wife is not happy with her pregnancy news. It has multiple reasons like tokophobia (fear of delivery pain), uncertainty about abortion conditions alliance with religious believes. Respondent shares her live story, my daughter is 11 years old. I develop a fear of delivery pain in my mind and promise myself to not get pregnant again. But, after 11 years of gap, right now I am pregnant just to have one male child in my family. I am depressed and feel unhappy. I go against my personal wish just to meet with in-laws demand. Another female educated respondent shares her lived experience as, I personally face unhappy pregnancy because of having one more son. (ALLAH jori mila dy) May ALLAH give another son, this was my mother-in-law's wish but I deliver three daughters to fulfill this wish.

Traditional gender roles and cultural constraints bound women in Pakistani society to violate their right of health and right of decision making about their body. On other side of frame, we observe that during pregnancy a woman can feel that this pregnancy is unplanned and they feel unhappy because of that but after giving birth to a child. Their motherhood make them comfortable with child and they feel happy. Pakistani women is socialize in this society penetrate the social norms and gender roles within it. So they become satisfied and adjusted in these matters. On the other hand, educated in-laws have very strong role. Some educated couples who have educated parents don't feel such mental pressure for having daughters. Educated people are happy to have son as they are socialize in this patriarchal society but at the same time education aware them enough that they not much concerned either way. Some mothers want daughters also as they see them closer to parents as compared to sons in old age. As, the economic stability is associated with sons, on the other side, emotional stability is associated with daughters. However, many few people in society have such pattern of thinking.

First delivered child and perceived status in family

In Pakistani society, the prevalence of son preference seems to be in strong association with the desires of in-laws for son. Findings mark this statement as true. Respondent argued that, my in-laws demand for a son. I have three daughters. My health does not allow me to get pregnant again but my mother-in-law and sisters-in law repeating their bitter words in front of me and give me mental pressure. This situation compel me to have unwanted pregnancy. As, I fear that if this time I deliver daughter then they will be unhappy and will have ill-behavior with me. Respondent share that, everyone is talking about mother-in-law's wish to have male child. In my case, my mother always say that in your whole pregnancy I pray for you to have son as it ensure and make female marriage strong. Society attach prestige to have first male child in family. It appears that there are multiple reasons because of them the people of society have desire for a son. Mostly, families desire for a son to carry family name and will give self-security to parents in old age. Respondent have a view that, I wish to have son. He will take care us in old age. I see some old couples those daughters get married and they left alone at home. In some cases, when parents move to daughters home, they loss their self-esteem.

Findings reveal multifactor analysis behind the prevalence of desire for a son in Pakistani families and even educated females from graduate colleges endorse these reasons. People have a mindset that sons in Pakistani society require less care than daughters as they attach family's respect with daughter's character. They also have a fear of distress that can be caused after the marriage of daughter such as settlement problems, conflict with in-laws, demands of in-laws and dowry burden. Some families mention inheritance issues as a reason to desire more sons in family.

Family structure and spouse understanding plays very important role in family planning. Couples who live in nuclear families don't have much involvement of others in their decisions. Although, people continuously poke their minds from their gossips but they are not as much concerned. However, they give mental pressure from their indirect intentions to involve in family planning decisions but here, research finds spousal understanding in couples plays a significant role. Respondent shares her lived experience as, I always live in nuclear family system since my marriage. The only pressure from my in-laws that I bear is the absence of son in my family. When I meet them, they talk about it. However, when your husband is with you in the matters related to family planning and other family affairs then everything is ok. Despite of the family demand, we decided that we don't need to go for any unwanted pregnancy. Despite the strong association between family and family planning decisions, in some cases when education of spouse, family structure and adoptability of modern approach towards life chances work in collaboration and interrelated form then the direct involvement of in-laws in couples family planning decisions is minimized.

Fertility and international gap of interests

It's essential to note that values and social mentalities are changing with the passage of time with the achievements in education, social mobility towards urban areas and mindfulness about gender orientation. Despite of these facts, in Pakistani society, there is son preference and associated social prestige with having more sons is still persisted in society in varying degrees. Old generation is more concern about male child. Respondent shares her mother's word as, May ALLAH give you son as your first child. Then, the matters in in-laws will settle down. It appears that the one of fear in parents for having daughters is the distress and conflicts caused in daughter's in-laws family for not delivering a son. Family consider deliver a baby boy as prestige. A female who have son is in strong position in family.

Pakistani society has been affected by man centric standards for a really long time. These standards put higher worth on male children because of their apparent capacity to carry on the family inheritance and accommodate the family. In certain social networks, having more male children is related with societal position and distinction. Respondent said that, Masha ALLAH, I have two sons. (Smiling with pride). My husband want to have one daughter but I refused as I don't want to get pregnant again. It shows that having sons is a matter of pride for Pakistani women. It boost their self-confidence to take the decisions of their own choice. A woman can say no for unwanted or unhappy pregnancy if she already have sons. Another perspective depicted from a respondent's statement is, in current scenario, couple should have only two children. We have two, and the expenses are hard to manage. Just for children bright future my husband is living abroad. Private school fees and food habits of our children stop them to have more children.

Furthermore, we find the intergenerational gap in interest towards gender control and family size. Like, the state of economy in our country inflates inflation. Parents struggle hard to fulfill their children needs. Young generation parents enthusiast to give their children bright future that result in fertility decline and small family size.

Economic considerations in son preference

In Pakistan, sons are in many cases seen as significant resources because of their expected contribution to the family's financial meets. Sons can help with money creating activities, subsequently expanding the family's efficiency and financial prosperity. There's an assumption in many societies, including Pakistan, that male children will upgrade the financial status of their parents in old age. This assumption originates from the belief that male children will have higher potential for achieving life opportunities contrasted with girls, consequently guaranteeing the parents economic stability in their later years.

Daughters perceived as financial burden because of the persisting dowry culture in society. Respondent said that, my mother-in-law stop us to spend money on my daughter's medical college fees. She said save this money for her marriage. Another respondent shares her lived experience and stated her own mothers comment on the heavy educational expenditures on daughters. She said that, Heavy educational expenditures can be spend on sons as they pay back you in old age when you are financially dependent on them. Spending heavy amount on daughters education is illogical as when they started job, they will soon get married. They others will have their income.

In patrilineal social settings like Pakistan, property legacy frequently goes through male members of family. Having male children guarantees that the family's riches and resources stay inside the patrilineal genealogy, protecting the financial status and influence of the family over ages. As opposed to having girls, who might require marriage settlements or huge marriage costs, male children are frequently viewed as less economic burdens. Families might see bringing up male children as an all the more financial feasible choice, as they are not supposed to bear the financial expenses related with their marriage.

Nexus between contraceptive use, abortion & unwanted pregnancy

The use of contraceptive methods have crucial role to prevent unwanted pregnancies. The unwanted pregnancies happen when people have low rates of contraceptive usage. There are multiple reasons behind the low rates of contraception among married Pakistani couples. Reasons vary

from accessibility, affordability and comfortable use results in low rate of adoptability. Respondent share her experience, my husband is not feeling comfortable with the contraceptive use. By the way, this the extra expenditure that can be avoid. People don't ponder over it as an important thing. Another respondent ironically said, people don't spend money on contraceptive purchase and have unplanned pregnancy and add the expenditure of unwanted child.

Affordability is an important factor that results in unwanted pregnancies that ultimately have economic burden for couple. An educated couple stated that, we never use any contraceptive method in our fifteen years of marriage as my husband don't like to use it. In my case, I heard that female contraception have many adverse effects on body. I don't want to face obesity which is one of the adverse effect of female contraceptive methods. It shows that people believe on the things from hearing from here and there. They don't experience the things by themselves and rely on others opinions.

Family planning decisions are highly influenced by the experiences of others in surroundings. A professional lady have contrary argument as, I use contraception from past eight years, Alhamdu-lillah no side effects experienced. No weight gain, no effect on body shape as we heard from people about it. These are just misperceptions. Women should consult an experienced gynecologist and take decisions by their own about reproduction. Educated women appears to be rational on decision making but these cases are in low ration in Pakistani society. Women rationality caught between their rational behavior and social norms when the societal pressure force them to catch traditional gender roles.

Moreover, the inconsistent and incorrect use of contraception is also the reason of unwanted pregnancy as people don't show enough knowledge about the available options of contraceptive methods. A respondent share that she don't know much about the available methods. My husband use the method of withdrawal as it is the only Islamic way to prevent pregnancy but she face two unwanted pregnancies due to them and have small gap between her children. It means people need to have sex education and awareness about contraceptive measures. They should learn about how to use them to avoid unwanted pregnancies. It's also seem that people have daughters have low rate of contraceptive use in their marital life. However, the people who want more sons in their family is not using contraception and have large family size.

Despite of extensive debates on international forums, there is always an open room for the good and bad about abortion practice. Findings of the study describe the nexus between the use of contraception and abortion of unwanted pregnancy. People poses low rate of contraceptive use due to multiple factors. Along with this fact, when they know that they face pregnancy that is unwanted and unhappy pregnancy simultaneously. They feel reluctant to abort as the most important responsible factor is their religious understandings. Many respondents share their likewise lived experiences. One of them stated that, when you know about your pregnancy you can't abort it as this is ALLAH's plan for you. People think that the abortion or intentional termination of pregnancy make them sinful. Although, there is plenty of existing literature and documented international debates on this matter. However, people perceive the efficacy of local knowledge that they derivate from here and there without authentic source of reference. As, the authenticity of knowledge and perception that they hold is operationalize for them from their peer groups including, family, friends, co-workers and, collectively from the close ones in intimacy and proximity in the society.

CONCLUSION

Uncertainty prevails regarding decisions taken for family planning in Pakistan. People have paradoxical understanding regarding unhappy and unwanted pregnancy which have different things if we keenly shed light on them. Unwanted pregnancies are unplanned or unintended pregnancies whereas, unhappy pregnancy is attach with the feelings of unhappiness of woman with pregnancy news. The main cause of unwanted pregnancy is low rate of contraceptive use and ambiguous minds about abortion. On the other hand, unhappy pregnancy is result of son preference.

It is generally recognized that people of Pakistani society have strong gender orientation patterns, or the cognition that directs their family planning decisions. The cultural values operate their reproductive behavior in which the son preference is in strong stance. Having son is the mark of social prestige in patriarchal society that results in large family size that paves way towards unhappy and unwanted pregnancies. Women health is on stake to meet the wish of more sons in family and she face unwanted pregnancies because of this demand of society. However, generally women themselves feel pride with son that directs their reproductive behaviors. Although, women with medical issues face risk factors because of having multiple pregnancies to catch their traditional gender roles and societal expectations. With regards to male child inclination, gender orientation hypothesis would recommend that the inclination for children is learned through socialization processes that underscore the significance of son preference in carrying on the family name and giving financial security in old age.

Despite the educational attainments, the Cultural constraints and social norms deeply rooted in our family institution. Pakistani women caught between rationality and entrenched societal values. Therefore, the universal documented women rights need to be explained on the base of cultural relativism proportions for the strong policy initiatives and their implementation.

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ARTÍCULO DE INVESTIGACIÓN

Motivos de la infidelidad conyugal y sus soluciones a la luz de los Objetivos del Derecho Islámico

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Resumen. Este estudio investiga los motivos de la infidelidad conyugal y su tratamiento desde la perspectiva de los Objetivos de la Ley Islámica. Este fenómeno se ha producido en el pasado; sin embargo, su propagación se ha hecho notable hoy en día debido al avance de los medios de comunicación social y la disponibilidad de canales visuales y de audio, por lo que tiene graves consecuencias para las familias y las sociedades. Este estudio pretende definir el concepto de infidelidad conyugal y los significados de los Objetivos de la Ley Islámica. Además, el investigador intenta examinar los motivos de la infidelidad conyugal y, en consecuencia, propone posibles remedios a la luz de los propósitos de la Sharia. El estudio adopta un enfoque inductivo-analítico para analizar los datos. El investigador analiza los factores que contribuyen a la infidelidad conyugal, las consecuencias de la infidelidad conyugal y la gravedad de la infidelidad conyugal para el individuo, la familia y la sociedad. Las conclusiones del estudio muestran que los Objetivos de la Ley Islámica desempeñan un papel importante en la estabilidad de la vida conyugal.

Palabras clave: motivos, infidelidad conyugal, tratamiento, Objetivos de la Ley Islámica.

Motives for marital infidelity and its remedies in light of the Objectives of Islamic Law

Abstract. This study investigates motives for marital infidelity and its treatment from the perspective of Islamic Law Objectives. This phenomenon has occurred in the past; however, its propagation has become remarkable nowadays due to the advancement of social media and the availability of visual and audio channels, and hence it has serious consequences for families and societies. This study aims to define the concept of marital infidelity and the meanings of the Objectives of Islamic Law. Moreover, the researcher attempts to examine the motives for marital infidelity and accordingly proposes possible remedies in light of Sharia purposes. The study adopts an inductive-analytical approach to analyze the data. The researcher discusses the factors that contribute to marital infidelity, the consequences of marital infidelity, and the seriousness of marital infidelity for individual, family and society. The findings of the study show that *the Objectives of Islamic Law* play an important role in stability of marital life.

Keywords: motives, marital infidelity, treatment, Objectives of Islamic Law.

INTRODUCTION

Allah subhanahu watalla (SWT) enact marriage to achieve affinity and mercy between spouses. He said “And among His Signs is this, that He created for you mates from among yourselves, that you may dwell in tranquility with them, and He has put love and mercy between your (hearts): verily in that are signs for those who reflect.” (Surat Al Rum, verse 21). Disputes between spouses and differences can cause marriage to deviate from its intended purposes and might cause marital infidelity. Marital infidelity surely has negative consequences for family and society. Historically, marital infidelity has been a common occurrence, yet it has become more prevalent in the modern era due to ubiquitous influence of social media as well as smart phones and other devices that facilitate the spread of this phenomenon. In fact, both social media and modern technology have contributed to illegal relationships that deviate from the right purposes of marriage. Thus, this study investigates this phenomenon light of Al Sharia purposes in the Yemeni context.

Problem Statement

Marital infidelity is a phenomenon that affects people worldwide, in both ancient and modern times. It has negative ramifications for individuals, families, and society at large. The use of social media and modern technology has contributed to its prevalence. Nevertheless, studies on the reasons for marital infidelity have so far been conducted separately from purposes of marriage. Moreover, there is scarcity of research that linked the reasons for marital infidelity and its treatment in Light of the Objectives of Islamic Law. Therefore, this study focuses on the reasons for marital infidelity and proposes possible remedies to this phenomenon from the prospective of the Islamic Law Objectives of in Yemen. As such, the following questions guide the study:

- What is marital infidelity and what are the Objectives of Islamic Law?
- What are the motives for marital infidelity, its effects, and how to address them?
- What are the most prominent purposes of Islamic Law for marriage and what are their role in protecting family life from deviation?

Research Objectives

- To deeply understand the concept of marital infidelity and what is meant by Objectives of Islamic Law.
- To explain the motives for marital infidelity and its implications and to treat it.
- To identify the purposes of marriage and its role in light of Islamic Law.

The Significance of the Study

The significance of this study stems from the fact that it diagnoses the motives of marital infidelity and proposes appropriate remedies to this phenomenon. It also identifies the ramifications of this phenomenon on individual, family and society. The study attempts to examine the role of Islamic Law Objectives in marital life.

The Scope of the Study

This study focuses on the prevalence of marital infidelity in Yemen.

LITERATURE REVIEW

Reviewing previous research in the field of one's research is essential for researchers to get to know what has already been explored and build on it. The following sections present the related literature.

Ibin Nora Hafidha (2016) conducted a case study on marital infidelity from woman side and its causes. What is important in this study is that the researcher provided a definition to marital infidelity and its causes from. However, the study did not address the purposes of Islamic Law and the ramifications of marital infidelity and its treatment, thus the present study will address this issue.

Hassan Al Saed Hamed Khatab (2009) studied the purpose of marriage and its implications a juridical and comparative study. The researcher divided the Objectives of Islamic Law into two parts: original Objectives subsidiary Objectives. He also investigated the effects of Objectives on the marriage contract. However, the researcher did not address the marital infidelity and its ramification and treatment in the light of Islamic Law Objectives. Thus, the current study will address these points.

Wife's obedience to her husband in Islamic jurisprudence (the jurisprudential dispute between spouses as a model). This study highlighted the wife's obedience to her husband and the legal evidence for obedience, the obligation of a woman to obey her husband, the ruling on a woman's obedience to her husband, and the impact of the jurisprudential dispute on personal matters. In fact, the study is related to the duties of the woman towards her husband not to the matters of the motives of marital infidelity and its implication and remedy in the light of Islamic Law Objectives (Mohammed Ibrahim Abdel Aziz Ibrahim Al-Abadi, 2018).

Contemporary family problems and their solution in the light of Al Sharia purposes. This study focused on the building a family from the perspective of Islamic Law Objectives, women's work and the controls of their work, the negatives of her leaving for work. It explained the position of Islamic legislation on domestic violence. However, the study did not address the matter of the motives of marital infidelity and how to treat it in the light of Islamic Law Objectives. This is the gap that the current study seeks to fill (Abdul-Wadud Mustafa Morsi, 2014).

Definitions of Infidelity

There are various definitions to infidelity (*Khianah*) in Arabic, infidelity for instance, is the opposite of honesty (*Al Amana*). The person who commits *khiana* is considered as *kha'in* i.e. a traitor. The plural form of Khain, is *Khawanah*, i.e. dishonest (Al-Ragheb Al-Isfahani, nd: 305).

Marital infidelity is conventionally defined as violating the right by breaking the covenant in secret. It includes all Sharia traditions and instructions (Obaid Allah bin Muhammad Abdul Salam Al-Mubarakfuri 1985:220).

According to Al-Jahidh, khiana is considered as despotism with what a person is entrusted with including money, honor and sanctity, owning what is entrusted, and denying its depositor (Al-Jahidh, NO DATE), p. 5570). Ibn Ashour defined infidelity as “the action of someone who was entrusted with something and he/she deceived what was entrusted for it, without the knowledge of the owner of the trust” (Al-Tahrir and Al-Tanweer, volume 24 p. 174).

Marital infidelity is defined as any treacherous behavior that harms the relationship between the two partners in terms of money, honor and life. Marital infidelity includes theft, lying, adultery, plotting and endangering the partner's life (Muhammad Bayoumi, (1991; 4). It is also defined as: a negative social phenomenon that exists in various human societies, but it differs from one society to another according to the imposed moral systems. It arises due to a defect in the natural relationship that binds spouses due to external influence of cultures and civilizations, which leads to destabilizing and disintegrating the family system as a result of the conflict between its members (Mad Allah, 2009).

There are several Quranic verses that prohibit marital infidelity, including the following verses:

The almighty Allah says: “and that Allah will never guide the snare of the false ones” (Surat Yusuf verse 52) that is those who betray the trust.

Allah says: “If you (O Muhammad SAW) fear treachery from any people throw back (their covenant) to them (so as to be) on equal terms (that there will be no more covenant between you and them). Certainly Allah likes not the treacherous. () (Al-Anfal verse 58) meaning: breaking a covenant.

Definition of Islamic Law Objectives

Linguistically, Arabic Maqasid Al-Shariah is defined as objective that has various meanings (Al-Farahidi, Kitab Al-Ain, vol. 3, p. 393, and (1424 - 2003).

Maqasid is defined as straightening the path: The Almighty Allah says, and upon Allah is the direction of the [right] way) (Surat An-Nahl verse 9) the verse suggests that Allah guides you to the straight path i.e. Islam and call upon you with clear arguments and proofs. *Tareeq qasid* means easy and straight. *Safar Qasid* means easy to reach. Moreover, Allah says: “If there had been immediate gain (in sight), and the journey easy, they would (all) without doubt have followed thee, but the distance was long, (and weighed) on them (.” (At-Tawbah 42).

Maqasid refer also as justice between two parties: It is between excess and negligence, justice and unfairness. Allah Almighty say: (some who follow a middle course), (Surah Fatir verse 32). The prophet peace be upon him said “*Al Qasd Al Qasd Tablugow*) meaning determine your right intention frequently you all will achieve your goals (Reported by Al-Bukhari, No. (6467) p. 1122. It is said: So-and-so is frugal in the maintenance and has been thrifty, and so-and-so is thrifty in his matter, that is, he/she has determined to be righteous in his/her matters (Al-Razi, 1999; 254).

Maqasid can mean objectives, intention, the request for a thing, and its proof, it is said: (I meant the thing, it has, and I focused on certain intention or direction and headed toward it) (Ibn Manzur, Lisan Al-Arab (section 3 / p. 96).

Objectives of Islamic Law conventionally defined as follows:

- 1) Muhammad Al-Taher bin Ashour defined Maqasid Al-Shariah as: (General Objectives of Islamic Law are the meanings and rulings observed by (Allah) the Lawgiver in all or most cases of legislation (bin Ashour, 2004; 165).
- 2) Alal al-Fassi defined Objectives of Islamic Law as the secrets that the legislator puts for each of its provisions), (Allal al-Fassi, 1993, p.7).
- 3) Ismail Al-Hasani (nd): The intended conciliatory goals of the rulings, and the intended meanings of the speech (Al Quran) (Ismail Al-Hasani).
- 4) Ahmed Al-Raisouni defined it as the goals that Al Quran and sunnah intended to convey to the people. In addition, what are the benefits that work in accordance with the Shariah ruling?
- 5) Based on the previous definitions, we can derive a definition of the Islamic Law Objectives as “the meanings and judgment that (Allah) lawgiver took into account in general to achieve interests and ward off evils).

METHODOLOGY

The current study follows the inductive analytical approach. The researcher reviews the previous and recently-published literature related to the motives of marital infidelity and its treatment in the light of Islamic Law Objectives. The data were elicited from various resources including research articles, magazines and internet resources. The researcher analyzed the resources which are related to motives of marital infidelity as well as the purposes of Al Sharia related to marriage.

Participants:

The participants of the study are 120 Yemeni nationals. A demographic analysis of the participants in the next section.

RESULTS

Demographic analysis of Participants

TABLE 1. Statistical description of the participants

1 - Sex

Variables	Frequencies	Percentage
Female	7	5.8
Male	113	94.2
Total	120	100.0

TABLE 2. shows the age of the participants

2 – Age

Variables	Frequencies	Percentage
More than 50 years	6	5.0
From 20 to 30 years old	8	6.7
From 31 years to 40 years	54	45.0
From 41 years to 50 years	52	43.3
Total	120	100.0

3 - Marriage period

TABLE 3. Period of Marriage

Variables	Frequencies	Percentage
Less than 10 years old	19	15.8
More than 10 years and less than 20 years	51	42.5
More than 20 years and less than 30 years	39	32.5
More than 30 years and less than 40 years	9	7.5
More than 40 years	2	1.7
Total	120	100.0

4 - Academic qualification

TABLE 4. Academic qualification

Variables	Frequencies	Percentage
Scientific leave	3	2.5
Bachelor	13	10.8
Diploma	2	1.7
PhD	62	51.7
Master's	40	33.3
Total	120	100.0

This section presents the statistical results of the mean and standard deviations the study dimensions.

Table 5. Indicates clearly that all the items related to motives for marital infidelity dimension were 3 points above the hypothetical mean score. This result demonstrates that there are reasons and motives for marital infidelity. All the items fulfilled overall means (3.823), standard deviation (1.088) and relative percentage (76%). The following sections present the statistical analysis of each item in the questionnaire.

TABLE 5. Means, Standard Deviations, and Percentage of marital infidelity motives

No.	Items	Means	Standard deviation	Percentage
1	Spouses' lack of religious faith is one of the reasons of marital infidelity.	3.96	1.024	0.792
2	Failing to fulfil the rights and obligations between spouses is one of the reasons for marital infidelity.	3.96	.982	0.792
3	Mixing unrelated men with women for long hours and sitting with each other is one of the reasons of marital infidelity.	3.38	1.101	0.676
4	A wife's bad treatment to her husband is one of the reasons of marital infidelity.	3.74	.902	0.748
5	Failure to adhere to Islamic teachings in marital relations is one of the reasons of marital infidelity.	3.30	1.220	0.66
6	Choosing a wife without doing any research about her characteristics is one of the reasons for marital infidelity.	3.67	1.070	0.734
7	Lack of affection between spouses is one of the reasons for marital infidelity.	4.00	1.013	0.8
8	Not restraining the gaze at unrelated men or women is a way to cause disagreement, and it may lead to marital infidelity.	4.02	1.247	0.804
9	Women's display of charms and adornment in front of men is one of the causes of marital infidelity	3.96	1.024	0.792
	Total	3.823	1.088	0.76

Motives for marital infidelity

1 – Items (7) and (8): “Lack of affection between spouses is one of the reasons for marital infidelity”, “Not restraining the gaze at unrelated men or women is a way to cause disagreement, and it may lead to marital infidelity” achieved the highest agreement among respondents to be the motives for marital infidelity. Clearly, these two items achieve a high mean score (4.00), (4.02) with percentages of 80 %, 80.4% respectively. This indicates that the two items receive the highest agreement compared to remaining items.

2 – Items (1), (2), and (9), namely “Spouses' lack of religious faith is one of the reasons of marital infidelity” “Failing to fulfil the rights and obligations between spouses is one of the reasons for marital infidelity”, “Women's display of charms and adornment in front of men is one of the causes of marital infidelity” achieved the second highest mean score (3.96), and a percentage of (79%). This indicated that this dimension is reliable for assessing the motives underlying marital infidelity.

3 – Items (4) and (6), namely “A wife's bad treatment to her husband is one of the reasons of marital infidelity”, “Choosing a wife without doing any research about her characteristics is one of the reasons for marital infidelity” achieved the third highest mean score (3.74), (3.67) and the participants expressed agreement with a percentage of (74%), and 73%, respectively.

4 - Items (3) and (5): "Failing to fulfil the rights and obligations between spouses is one of the reasons for marital infidelity", "Failure to adhere to Islamic teachings in marital relations is one of the reasons of marital infidelity" achieved a moderate score (3.30), (3.38), with a percentage of (66%) and (67%) respectively which is considered as good response.

The results show that the standard deviation for all items are moderate; they are neither too far apart nor close to their means i.e. they are confined between 1.247 and 0.902.

Based on participants' responses, it can be concluded that the overall mean score proved that there are motives for marital infidelity. Table 1, shows the means, standard deviations, and the relative percentage of the items of the motives for marital infidelity.

Solutions to limit incidence of marital infidelity

Table 2 shows the items related to solutions for limiting incidence of marital infidelity. The mean scores indicate that there are potential solutions for marital infidelity. This statistical result indicates that there is an agreement among participants about potential solutions to marital infidelity with a high response degree, as all items achieved a total mean of (4.366), with a standard deviation of (0.813), and relative percentage (87%). The results of the statistical analysis at the item level are as follows.

1 – Item (2), (3), and (4), namely "treating wives kindly preserves the family entity and cultivates happiness in the Muslim home", "Reducing exposure to temptation that stirs instincts through its various visual, audible means", "Recognizing marital problems at an early stage and tackle them and trying to solve them in positive ways achieved the highest degree of agreement among participants. The mean scores of these items were (4.22) (4.26), (4.30), with percentages of (84%, 85%, 86 %,) respectively.

2 – Items (1) and (5), namely "Spouses should share responsibility and each one has to adhere to these rights and duties accordingly", "Spouses should admit their mistakes and search for a solution instead of denial or persistence so as not to make the other party resort to others to satisfy their desires." achieved the second highest agreement among participants of being solutions to end marital infidelity. The person responsible for the problem should acknowledge his/her mistake and come up with a solution rather than denying so as not to provoke other party to resort to others to satisfy their desires". These items achieved these means scores (4.09), (4.15) respectively, with percentages of 81%, 83%. This indicates that the two items are high in terms of the degree of agreement among participants.

The results indicate that the standard deviation values for all the dimension items are moderate, neither far apart nor close to their mean; they are confined between 0.921 and 0.729. Accordingly, this result comes in favor of the agreement. Table 6 shows the means, standard deviations, and the relative percentage of the items of the dimension of solutions of marital infidelity.

TABLE 6. Means, Standard deviations, and percentage of remedy to reduce incidence of marital infidelity

No.	Items	Means	Standard deviation	Percentage
1	Spouses should share responsibility and each one has to adhere to these rights and duties accordingly	4.09	.710	0.818
2	Treating wives kindly preserves the family entity and cultivates happiness in the Muslim home.	4.30	.846	.86
3	Reduce exposure to temptations that provoke instincts through its various visual, audible and readable means.	4.26	.921	0.852
4	Recognizing marital problems at an early stage and tackle them and trying to solve them in positive ways.	4.22	.832	0.844
5	Spouses should admit their mistakes and search for a solution instead of denial or persistence so as not to make the other party resort to others to satisfy their desires.	4.15	.729	0.83
The overall mean of remedy items to reduce marital infidelity		4.366	0.813	0.87

Negative consequences of marital infidelity.

Table 3 shows that the mean scores of all the items that express consequences of marital infidelity increased more than the hypothetical mean (4). This result indicates that the participants' agreement and that there are negative consequences for marital infidelity. All the items achieved a total mean (3.535), with a standard deviation (0.909) and relative percentage (70%). The following are the results of the statistical analysis at the items level:

- 1) Items (2), (5) and (6) "Divorce is an option taken by one of the spouses as a result of the consequences of marital infidelity", "disintegration of the family is among the results of marital infidelity", and "sadness, depression, anxiety and mental illness are among the consequences of the of marital infidelity" achieved the highest agreement among participants. These items achieved these means scores (4.37), (4.12), (4.00), with percentages of 80%, 82%, 87% respectively. This shows that these items achieved a high degree of agreement in terms of among participants compare with the rest of the items.
- 2) Items (1) and (7) "Divorce is an option taken by one of the spouses as a result of the consequences of marital infidelity", "the spread of sexual diseases such as AIDS, syphilis in society are among the consequences of marital infidelity" achieved the second highest score among participants. The means scores of these items are (3.95) (3.99), with relative percentage (79%) (79%) respectively, with a high degree of agreement.
- 3) Items (3), (4) and (8) "Children's deviation is among the results of marital infidelity", "Violent behavior such as beating, killing is as a result of marital infidelity", "lack of security, stability and peace of mind are among the results of marital infidelity" achieved these mean scores (3.92) (3.93) and (3.94) with relative percentage (78%) (78%) (78%), respectively.

The results indicate that the standard deviations of all the dimension items are moderate, neither far apart nor close to their means i.e. confined between 1.070 and 0.830. Table (7) shows the means, standard deviations, and the relative percentage of the items of the dimension of marital infidelity motives.

TABLE 7. Mean, standard deviations, and percentage of consequences of marital infidelity

No.	Items	Means	Standard deviation	Percentage
1	Marital infidelity makes spouses loses trust between each other.	3.99	1.017	0.798
2	Divorce is an option taken by one of the spouses as a result of the consequences of marital infidelity.	4.37	.859	0.874
3	Children's deviation is among the results of marital infidelity	3.93	1.070	0.786
4	lack of security, stability and peace of mind are among the results of marital infidelity	3.94	1.032	0.788
5	Disintegration of the family is among the results of marital infidelity	4.12	.997	0.824
6	Sadness, depression, anxiety and mental illness are among the consequences of the of marital infidelity	4.00	.830	0.8
7	The spread of sexual diseases such as AIDS, syphilis in society are among the consequences of marital infidelity	3.95	.977	0.79
8	Lack of security, stability and peace of mind are among the results of marital infidelity	3.92	.931	.784
Total		3.535	.909	0.707

Creating marital happiness:

It is evident from Table (8) that all the items that express the dimension: "creating marital happiness" have achieved a mean score greater than the hypothetical mean (4). This result revealed that the participants' agreement on the items that leads to creating marital happiness. All the items achieved a general mean of (4.242), a standard deviation of 0.771 and relative percentage (84%). The following are the results of the statistical analysis at the items level:

1 – The Items, (4) and (5), namely "Mutual appreciation and respect between spouses is part of marital happiness", "mutual concern between spouses and treating each other kindly is among the things that create marital happiness" achieved the highest agreement among participants. The mean scores of these items reached (4.35), (4.39) with percentages (87%) (87%) respectively. This indicates that the two items are higher in terms of degrees of agreement than the rest of the items.

2 – Items (3) and (8), namely " Maintaining physical contact between spouses is one of the things that creates marital happiness" and "Adopting dialogue and openness between spouses by disclosing their needs are among the things that create marital happiness" achieved the second highest degree of agreement among participants. The mean scores reached (4.28) (4.31) (24.3) with relative percentage (85%) (86%) (86%) respectively.

3 – Items (2), (6) and (7), namely “Taking care of well-groomed appearance by both spouses is one of things that create marital happiness”, “Taking long vacations to keep away from the hustle and bustle of life enable spouse to engage in love and tenderness”, “Avoiding stress and depression, showing positive attitude, are among the things that create marital happiness” achieved the third highest degree of agreement among participants. The mean scores of these items were (4.03) (4.08) (4.18) with relative percentage (80%), (81%) and (83%) respectively.

The results indicate that the standard deviation of all the dimension items are moderate, neither far apart nor close to their mean; they range between 0.987 and 0.765. Accordingly, this result indicated the achievement of creating marital happiness based on the participants’ answers, with a high response level through the total mean of the item. Table (8) shows the means, standard deviations, and the relative percentage of the items of “creating marital happiness”.

TABLE 8. Means, standard deviations, and percentage creating marital happiness

No.	Items	Means	Standard deviation	Percentage
1	Mutual satisfaction of the two spouses about each other is one of the things that create marital happiness	4.28	.980	0.856
2	Taking care of well-groomed appearance by both spouses is one of things that create marital happiness	4.03	.987	0.806
3	Maintaining physical contact between spouses is one of the things that creates marital happiness	4.32	.850	0.864
4	Fourth: Creating marital happiness: Mutual appreciation and respect between spouses is part of marital happiness.	4.35	.885	.87
5	Mutual concern between spouses and treating each other kindly is among the things that create marital happiness	4.39	.892	.878
6	Taking long vacations to keep away from the hustle and bustle of life enable spouse to engage in love and tenderness	4.18	.799	0.836
7	Avoiding stress and depression, showing positive attitude, are among the things that create marital happiness	4.08	.784	0.816
8	Adopting dialogue and openness between spouses by disclosing their needs are among the things that create marital happiness	4.31	.765	0.862
Total		4.242	0.771	0.848

DISCUSSION

Islamic Law Objectives of marriage and its role in family life.

Marriage has great and noble purposes. Below, we discuss the most important purposes of marriage.

Marriage purposes:

Survival of the human species appropriately and satisfactorily since marriage is a reason for the offspring that sustains a human being.

Muslim scholars have unanimously agreed that protecting offspring is one of the five necessities in Islam. In fact, there is no disagreement among Muslim scholars that one of the overall purposes of marriage is to have offspring. The main reason for marriage is to have offspring (Ibn Abi Bey, (nd) 308 p.). Allah created man to achieve two goals, namely worshiping Him and building the earth. The Almighty Allah says: "It is He Who has produced you from the earth and settled you therein" (Surat Hud verse 61). That is colonize you, meaning that He orders you to build the earth. Linguistically, if the Arabic letter (*seen* س and the letter *Ta* ت are added to the beginning of the Arabic verb, they show formula of request. A wise person does not object to the fact that construction of the earth and preservation of the human species depend on reproduction and multiplication of the sons of Adam. Furthermore, birth control affects societies due to old age and extinction. Thus, Islamic jurists have agreed that it is not permissible to issue a general law that limits the freedom of spouses to have children.

Achieving chastity and virtue and protecting society from immorality.

Prophets, peace be upon them, unanimously agreed that fornication is forbidden since it undeniably has harmful consequences to society and public health. The believer who desires the pleasure of Allah and Paradise should avoid immoralities and major apparent and hidden sins. In fact, there are great deal of temptations, especially in our time. The Almighty Allah said: "And go not nigh to fornication; surely it is an indecency and an evil way" (Surat Al-Isra, verse 32). The almighty Allah commended us not to come near adultery. Islam commanded those who are poor and cannot afford marriage to protect oneself against worldly temptations by fasting and avoiding close contact to the prohibited acts. Moreover, poor Muslims should always strive for making the required dowry for marriage and the Almighty Allah will surely help them. Those who are rich, on the other hand, should respond to the order of the Messenger of Allah, peace be upon him when He said: "Those of you who can afford marriage should marry; it restrains the gaze and fortifies one's chastity. Those who cannot should fast; it controls the sexual desire, (Narrated by Al-Bukhari No. 1605), vol. 3 / p. 26. Another narration concerns young men because they are the most vulnerable to deviation and falling into fornication because of their raging desire. Allah's messenger peace be upon him, said: (O young men, whoever among you can afford it, let him get married, for it is more effective in lowering the gaze and guarding one's chastity. (Narrated by Al-Bukhari in his Sahih No. 5066) / p. 3, and *Al-Ba'a*: is the provisions of marriage, such as housing, alimony, and ability to cohabit. The origin of the word '*Al-Ba'a*' is the word "*tabaw'a*", which means settled, and celibacy does not settle except through marriage.

Achieving affection, mercy and tranquility between spouses: The Almighty Allah says: "And among His signs is this, that He created for you mates from among yourselves, that ye may dwell in tranquility with them, And He has put love and mercy between your (hearts): Verily in that are signs for those who reflect). (Surah Al-Rum verse 21).

According this verse, the main purposes of marriage is tranquility and family stability. In order to achieve such purposes, Allah made love and mercy between the husband and the wife. Homogeneity is one of the causes of harmony and acquaintance, just as discord is one of the causes of separation and disharmony (Abi Al-Saud, (no date; 52).

Tranquility and innate attraction are one of the miracles of the almighty Allah. A man loves a woman and get attached to her without any previous relationship. Thus, she will calm him when he is angry, pacifies him when he is anxious and tempted. In order for affection, mercy and serenity to last, it is necessary to act according to the words of Allah: “live with them on a footing of kindness and equity” (Surat An-Nisa, Verse 19) Allah also says: “And women shall have rights similar to the rights against them according to what is equitable” (Surat Al-Baqarah verse 228). Ibn Taymiyyah said: “the intention of marriage is not only to enjoy but also to connect and companion; it is the highest degree of companionship, so whoever does not intend to be accompanied, nor enjoy and have sexual relationship, he must be a liar” (Ibn Taymiyyah, (nd: 272). Ibn al-Qayyim (nd; 85) said: Allah has made marriage a means to affection, mercy, offspring, restraining the gaze, guarding chastity, and so on.

Having children and building a stable family: Ibn Abbas, May Allah be pleased with him, interpreted the Quranic verse: “And those who pray, “Our Lord! Grant unto us wives and offspring who will be the comfort of our eyes, and give us (the grace) to lead the righteous” (Surat Al-Furqan, Verse 74), by saying that it is those who act in obedience to Allah will dwell contently in the hereafter (Ibn Katheer, (nd; 119). Al-Hasan Al-Basri, may Allah have mercy on him, says: (By Allah, nothing is more pleasing to the eyes of a Muslim than to see an obedient son. The Prophets of Allah piece be upon them used to pray to the Almighty Allah to grant them righteous children. Prophet Zakaria, peace be upon him, who says: “Oh Allah make my child me one that will (truly) represent me, and represent the posterity of Jacob; O my Lord! One with whom thou art Well-pleased!” (Surat Maryam verse 6), and he (Zakaria) said: “There did Zakariya pray to his Lord saying: “O my Lord! Grant unto me from Thee a progeny that is pure; for you are He that hear prayer!” (Surat Al Imran Verse 38). Moreover, Zakaria, peace be upon him said (Now I fear (what) My relatives (and colleagues) (Will do) after me: But my wife is barren: So give me an heir As from Thyself (5); (One that) will (truly) represent me, and represent the posterity of Jacob; And make him, O my Lord! One with whom Thou art Well-pleased! (6)). (Surat Maryam 5-6). The Messenger of Allah, Mohammed, peace and blessings be upon him, said: “When a man dies, his deeds come to an end except for three things: Sadaqah Jariyah (ceaseless charity); a knowledge which is beneficial, or a virtuous descendant who prays for him (for the deceased). (Narrated by Muslim No. 1631) c/3 pg. 1255. Thus, Islam urged the formation of the family and called for people to live in its shadows. It also warned strongly against trying to get rid of the bonds of family as it endorses that family life is from his Sunnah. Marriage is not only to obtain the pleasure of the Almighty Allah. It is a means of piety, preserver of lineages and the strong bond between parents and the way of harmony between them and their children. In this regard, Al-Tahir bin Ashour, May Allah have mercy on him, says: “Regulation of families in the nation is the basis of its civilization. Therefore, taking great care of controlling the family system was the goal of all human laws. Islamic Sharia serves as a guardian over all the laws so that the rules that it legislated for the family were the most just, reliable and time-honored rules. In fact, the original principle in the legislation of the family matter is the tightening of the bond of marriage and the tightening of the bond of kinship the tightening of the bond of in-laws as well as the tightening of the manner of dissolution of what accepts the dissolution of these three ties (Ibn Ashour (no date; 174-182) pp. 174-182).

Responding to the innate (fitrah) and the instinctive inclination of the spouses: spouses should satisfy sexual needs of each other in the legitimate way that Allah has made lawful. (Fair in the eyes of men is the love of things they covet: women and sons; heaped-up hordes of gold and

silver; horses branded (for blood and excellence); and (wealth of) cattle and well-tilled land), (Surah Al Imran Verse 14). Abu Dharr, May Allah be pleased upon him said: The Messenger of Allah, peace and blessings be upon him, said: in the case of one of you have intercourse with his wife is charity.” Companions of the prophet said: O Messenger of Allah, when one of us fulfils his carnal desire will he have some reward for that?” He (peace and blessings of Allah be upon him) said, “Do you not see that if he were to act upon it [his desire] in an unlawful manner then he would be deserving of punishment? Likewise, if he were to act upon it in a lawful manner then he will be deserving of a reward. There is nothing wrong with a man coming to his wife and love to make intercourse. Messenger of Allah, peace and blessings of Allah be upon him, said, “Women and perfume have been made dear to me, but my comfort has been provided in prayer” (Abi Dar Al-Ghafari (nd;763).

In Musnad of Anas bin Malik No. 12294), vol. 35 / p. 376, Messenger of Allah, peace be upon him, said: “You should marry virgins, for their mouths are sweeter, their wombs are more prolific and they are satisfied with less” (Narrated by Ibn Majah in Sunna, section 3 / p. 64, 1861, Jaber bin Abdullah said: I married a widow woman during the reign of the Messenger of Allah (peace and blessings of Allah be upon him) He (The Messenger) said to me: if that possible to marry a virgin woman, she will play and flirt with you (Reported by Imam Al-Bukhari in his Sahih, Vol. 7/p. 37, No. 5247). Sheikh Abu Zahra says: “the purposes of Sharia for legal marriage are represented in three things: First: the satisfaction of sexual desire, achievement of chastity and modesty. The second purpose is to achieve legal procreation, and the satisfaction of the instincts of fatherhood, motherhood, kinship, relationship, building the land, and the worship of Allah is derived from it. The third purpose is to establish a good life based on tranquility, affection, mercy, communication, compassion and cooperation among people, especially relatives. In this way, society is reformed and life is straightened (Abu Zahra, (no date; 7-8).

Submitting to the Almighty Allah and following His Messenger

One of the purposes of marriage is to respond to Allah and follow His Messenger peace be upon him. Among the things that bring pleasure to the heart of a believer is submitting to Allah. It is noticeable that the believers’ heart has no life without submitting to Allah’s commands. Allah Almighty has ordered His servants to marry. Allah says: “marry the unmarried among you and the righteous among your male slaves and female slaves” (Surat An-Nur, Verse 32). The command in the verse is directed to fathers and guardians to marry those who are still single and under their guardianship. Considering their age and experience, the guardians are better able to know the purposes and fruits of marriage. Therefore, acts of obedience are called offerings, so whoever intends to marry in response to the command of Allah, he will come closer to Allah and then he will be rewarded. The servant continues to draw near to his Master (Allah) until he loves Him. The Messenger peace and blessings be upon him, explained His way in marriage when a group of people asked about His worship but they misestimated it, and one of them resolved and said: (I keep away from women and never get married” When the Messenger of Allah may Allah heard about it, he said: “You are the ones who said such-and-such? By Allah, I am the most fearful of Allah and the most pious of you, but I fast and break the fast, I pray and lie down, I marry women, so whoever turns away from my *Sunnah* is not from me” (Reported by Al-Bukhari, Volume 7, pg. 2, No. 5063). The Messenger of Allah, Muhammad, peace be upon him, married and did not violate the *Sunnah* of the prophets before him, whom Allah described and praised. Allah says “We did send apostles before you, and appointed for them wives and children: And it was never the part of an apostle to bring a sign except

as God permitted (or commanded). For each period is a Book (revealed).) (Surat Ar-Ra'd, verse 38). The Messenger peace be upon him also said "whoever is able to marry, let him do that (Narrated by Ibn Majah, No. 1863). He also said: "Whoever among you is able to marry, let him marry) (Al-Bukhari, (1905; 26). In fact, the prophetic command is addressed to those who are able to marry, and thus leaving marriage does not draw Muslims closer to Allah as one of the people believed in the aforementioned hadith.

Fulfilling half of the religion: Asceticism is not to leave marriage, and to abandon women. Sufyan bin Uyaynah said: "The abundance of women is not extravagance, because Ali, may God be pleased with him, who married four wives, was the most ascetic of the companions and had four wives." (Ahmed bin Ajiba, "*Al Niat Al Salihat*" Good Intentions, p. 120). If a person asks for marriage, he/she will fulfill half of his/her religion. This confirms what the Messenger peace be upon him said: "Whoever marries has secured half of his religion, let him/her fear Allah in the other half." In another narration, the messenger said: "Half of faith has been completed." (Al-Tabarani included it in *Al-Awsat* vol.7 p.332). While worship is interrupted by death but marriage as worship continues after death. Ibn Abidin said "we have no worship that was established from the era of Adam until now and continues in Paradise except marriage and faith) (Hashiyat Ibn Abidin, vol.3/p.3). It is important to follow the Prophet's guidance which is the essence of righteousness. Righteousness is better than a thousand honors. Imam Ahmed narrated "He who gets married for the sake of Allah and marries one's children off for the sake of Allah will surely deserve to be a friend of the Almighty Allah" (Narrated by Imam Ahmad / pg. 457). The Messenger of Allah (Mohammed) peace be upon him characterizes those who get married for the sake of Allah as being perfectly faithful. He said: "Whoever gives, hates, gets married for the sake of Allah, has perfected his faith) (Narrated by Imam Ahmad in *Al-Musnad*, Vol. 24, p. 399, No. 15638).

CONCLUSION

This research investigated the concept of marital infidelity in light of Islamic Law Objectives. More specifically, it examines motives for marital infidelity and its impact on the family and society in the Yemeni context. The study reveals the following:

- Understand the concept of marital infidelity and Sharia purposes. Marital infidelity represents each traitorous behavior that harms either partner of the marital relationship in terms of money, honor and life. These include theft, lying, adultery, plotting and endangering the partner's life. Objectives of Islamic Law are meanings and judgment that the legislator (Allah and His Messenger) took into account in general and specially to achieve interests and ward off evil)
- It was found that all the mean of "motives for marital infidelity" is more than the hypothetical mean (3). This result indicates the participants' agreement that there are motives for marital infidelity with a high response degree.
- The study shows that there are serious consequences to marital infidelity such as loss of trust between spouses, divorce and violence,
- It was found that the mean of all the items that express "remedy to reduce the incidence of marital infidelity" is more than the hypothetical mean (4). This result indicates the participants' agreement that there are solutions to marital infidelity with a high response degree.

- The study shows that it explains the reasons for marital happiness include mutual respect, spouse's satisfaction of each other and as well as maintaining physical contact.
- The study shows the significant role of Sharia purposes in marital life in relation to preserving the survival of human race, chastity, protecting society, achieving affection, mercy, tranquility, submitting to Allah and following the Prophet Mohammed peace be upon him.

RECOMMENDATION

The researcher recommends the establishment of a community organization that conducts educational programs via in the audiovisual media and social media to preserve the family and marital life.

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INTERACCIÓN Y PERSPECTIVA

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ARTÍCULO DE INVESTIGACIÓN

Cambios en el desarrollo del capital humano en las condiciones de las operaciones militares a gran escala y las crecientes tendencias mundiales hacia la digitalización

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Resumen. El objetivo de la investigación consiste en explorar, cómo el capital humano en Ucrania ha cambiado debido a dos factores: la guerra y la creciente digitalización. Se analiza cómo la guerra afecta al capital humano, generando experiencias colectivas de migración, muerte y daño psicológico. También se examina cómo

la inteligencia artificial (IA) ha reemplazado a los humanos en diversas actividades productivas, lo que puede perjudicar al capital humano por distintas razones. Metodológicamente, se empleó la geopolítica crítica como marco teórico, junto a la hermenéutica y a la mayéutica. Adicionalmente, se usó la técnica de las entrevistas abiertas a dos expertos en materia de defensa y seguridad. Los resultados obtenidos permiten concluir que, para aprovechar el potencial de la era digital y fomentar el desarrollo del talento humano, los responsables de las políticas públicas deben adoptar un enfoque proactivo e integral en la gestión del capital humano. Esto incluye: a) invertir en educación y capacitación tecnológica para preparar a los trabajadores para los empleos del futuro; b) promover la inclusión digital y la alfabetización mediática; c) regular el uso de la IA para proteger los derechos individuales y la privacidad, y; d) fomentar la innovación y el emprendimiento.

Palabras clave: capital humano, guerra en Ucrania, digitalización de la sociedad, operaciones militares a gran escala, geopolítica crítica.

Changes in development human capital in conditions of the large-scale military operations and growing global trends towards digitalization

Abstract. The aim of the research is to explore, how human capital in Ukraine has changed due to two factors: war and increasing digitalization. It analyzes how war affects human capital, generating collective experiences of migration, death and psychological damage. It also examines how artificial intelligence (AI) has replaced humans in various productive activities, which can harm human capital for different reasons. Methodologically, critical geopolitics was employed as a theoretical framework, along with hermeneutics and maieutic. Additionally, the technique of open interviews with two defense and security experts was used. The results obtained allow us to conclude that, to take advantage of the potential of the digital era and foster the development of human talent, public policy makers must adopt a proactive and comprehensive approach to human capital management. This includes a) investing in education and technological training to prepare workers for the jobs of the future; b) promoting digital inclusion and media literacy; c) regulating the use of AI to protect individual rights and privacy, and d) fostering innovation and entrepreneurship.

Keywords: human capital, war in Ukraine, digitization of society, large-scale military operations, critical geopolitics.

INTRODUCTION

According to authors such as Kissinger (2016), Arbeláez-Campillo, and Villasmil (2020), the current world order is undergoing a significant structural transformation, influenced by changing geopolitical conditions. Thus, the hegemonic unipolarity of the United States of America, predominant since the collapse of the USSR, faces the rise of emerging powers that are pushing towards a multipolar international system in the 21st century.

The changes in form and content of the international architecture are manifested in the growing influence of countries such as China, India and Brazil, challenging traditional Western dominance and promoting, at every moment, a more equitable distribution of global political power and a permanent tension of the asymmetrical power relations promoted by the United States. In today's world, tensions between great powers, trade disputes, and regional conflicts further complicate this panorama of increasing entropy, generating uncertainty and the strategic need for adaptation by all international actors, as stated by The Roscongress Foundation (2024). The search for strategic alliances and the strengthening of regional cooperation have become crucial to navigating this new world order, as evidenced by initiatives such as BRICS+.

The concept of a multipolar world represents an alternative to outdated models of international relations and opens up new opportunities for global cooperation and development. It is a strategic necessity, and a moral choice aimed at a sustainable future for all nations on the planet (The Roscongress Foundation, 2024, para. 2).

In this scenario, the advance of human capital in Ukraine has been strongly impacted by the large-scale military operation carried out by the Russian Federation since February 2022. In the words of Pryimak, et al. (2023), the conflict has caused massive displacements of the civilian population, leading to a considerable loss of human resources and the disruption of education and vocational training. At the same time, the destruction of infrastructure, lack of resources and collective insecurity have dramatically restricted the possibilities for personal and professional growth for Ukrainian citizens. As if this were not enough, the war has generated widespread psychological trauma, affecting the mental health and well-being of the population, which in turn negatively impacts productivity and the capacity for social innovation, as Elvevåg and DeLisi (2022) argue.

As can be inferred a priori, Russia's military aggression has adversely affected Ukraine's human capital, reducing the possibilities for its training and sustained growth. The conflict has caused a decrease in production and an emigration of skilled workers abroad, which has had a negative impact on the national economy. Consequently, soon, the rehabilitation of conflict-torn areas and regions requires skilled employees, economic funds, infrastructure and advanced technologies, as a condition for the possibility of rebuilding Ukraine, in accordance with the requirements of the digital age.

For the reasons alluded to, the authors of this research hypothesize that: in order to reduce the material and moral consequences of war, restore the economy and strengthen the country's defense capabilities, a high level of development in human capital is essential. Much more so since, according to Pryimak, et al., (2023), the knowledge and skills of employees increase labor productivity, which has a positive effect on the economy as a whole and on the country's competitiveness in international markets.

The overall objective of this research is to explore, qualitatively, how human capital in Ukraine has suffered and changed due to two factors: the war and increasing digitalization. It analyzes how war affects human capital, generating collective experiences of migration, death, and psychological damage. It also examines how artificial intelligence (AI) has replaced humans in various productive activities, which can harm human capital due to job reductions. This analysis allows for a better understanding of the challenges and opportunities faced by human capital in Ukraine in this context of conflict and the coming technological transformation of society.

It should be clarified that, for some, the concept of human capital can be controversial if it is considered that people are not simply a resource at the disposal of a nation or corporation, but

beings with human dignity, histories and transcendental lives. Therefore, from a humanistic and philosophical perspective it is important to recognize the intrinsic value of each individual and their right to fully develop, beyond their economic contribution. In this sense, the term «human talent», as explained by Vallejo (2016), may be more appropriate, since it emphasizes the skills, potential, and uniqueness of each person. In any case, in semantic terms, the notions of capital or human talent recognize that the development of human capacities must be focused on the well-being and fulfillment of people and not only on economic growth.

For the authors of this research, the classic concept of «human capital» focuses on employees as an asset that can be managed and exploited to maximize the efficiency and productivity of an organization, community, or country. And, although this notion tends to consider employees as «interchangeable pieces» in a system, prioritizing their technical skills and knowledge. You don't have to deny that employees are unique individuals with diverse skills, experiences, and aspirations. Consequently, any public policy focused on the promotion of human capital focuses, or should focus, on the development of the potential and talent of each person, fostering creativity, innovation and commitment.

This research is divided into four (04) parts: in the first, a review of the existing literature on human capital and its development in contexts of conflict and digitalization is carried out; in the second part, the fundamentals of the research methodology are exposed; in the third part, a qualitative analysis of the data collected through interviews and documents that refer to the case in Ukraine is presented, in order to generate a discussion of the results and their implications for public policies and human capital development strategies. Finally, the conclusions and recommendations for future research are presented. In teleological terms, this text has the cognitive purpose of improving the understanding of the challenges and opportunities faced by human capital in Ukraine, in addition to contributing to the creation of more effective public policies to promote sustainable development in the context of war and digitalization.

LITERATURE REVIEW

This documentary selection is based on the collection of high-impact and open access scientific articles, published in the last five years, that address the theories of human capital and its development in contexts of conflict and digitalization. The selection criteria prioritized: (a) cognitive contributions on theories of human capital in relation to conflict and digitalization; (b) the methodological approach and the perspectives of analysis employed; and (c) the limitations identified in each investigation. The objective of this brief section was to provide, for the reader's understanding, a synthesis of the most relevant findings and current perspectives in this field.

The study by Neboha, Zapsha, Kuznetsova, Golikova, and Lyubov (2024) analyzes human capital as a dominant factor in the knowledge economy, highlighting the importance of corporate vocational training based on digital tools. The research conducts a SWOT analysis to determine the strengths, opportunities, weaknesses, and threats of human capital development in Ukraine, identifying their key determinants in the process. The results obtained are based on methods of analysis and synthesis, graphical analysis and SWOT analysis. One limitation worth mentioning is its specific focus on Ukraine, which may restrict the generalization of its findings to other contexts, near or far.

Another relevant article highlighted for its content and significance authored by Qureshi (2023), examines the magnitude of digital transformation for development, arguing that human capital is key to effective digital transformation that drives sustainable development. Qureshi (2023), stresses that access to ICTs, skills and knowledge are necessary conditions to prevent digitalization from exacerbating existing inequalities. It therefore advocates investing in human capital to enable the innovative use of ICTs, even in situations of conflict and calamity. Finally, the article points out that digital transformation requires a transformation of human capabilities, including human capital as its cross-cutting axis, to achieve radical improvements in people's lives and, even more, in their communities.

In this vein, comparative research entitled *Comparative analysis of human capital management strategies in the context of digitalization of the national economy* (Khoruzhy, Khoruzhy, Kubrushko, Karataeva, & Bitkova, 2023), examines human capital management tactics in the context of the digitalization of national economies. The research details various theoretical structures of the phenomenon of human capital and, at the same time, reveals the polyparadigmatic essence of the analysis of the management strategies of this form of capital. Among their most notable contributions, the authors highlight that risk trends, such as global transformations in technology, demography, social instability and climate challenges, in addition to changes in human resources, shape, sociologically speaking, social organization. Therefore, the research proposes a methodology to perform complex modular measurements of human resources and evaluate the impact of micro, meso and macro factors on the economic performance of the digital environment.

In the words of Neboha, et al. (2024), several authors examine new forms of interactions of human talent and the skills necessary to meet the requirements of Industry 4.03. In addition, the importance of harmonizing the challenges of human capital management with the digital technologies used by companies in various industrialized countries is discussed. In this context of study, the issues of human capital development in the framework of the digitalization of society stand out, offering a perspective of the conception of work in the current circumstances. These studies underscore the relevance of constantly improving the professional skills of workers, with the purpose of establishing a continuous training system based on the idea of «learning organization» (Qureshi, 2023).

In a synthesis view, the literature consulted highlights the relevance of human capital as a force for sustainable development in the digital age, particularly in conflict situations. Beyond the particularities of each research, in general, the strategic importance of investing in education, digital skills and mental health is emphasized to ensure that individuals can adjust to technological transformations and overcome the challenges generated by the war. In the current context, business professional training, the management of human talent and the generation of environments of constant learning are fundamental tools to model human capital in a conflictive world that is continuously changing towards the digitalization of social life.

METHODOLOGY

The methodological architecture of this research is based on critical geopolitics, which facilitates the analysis of power discourses and underlying ideological positions in relation to the conflict in Ukraine. According to Le Dantec (2007), critical geopolitics, on the one hand, analyzes the political and geographical dynamics that shape power relations in the world order and, on the other, deconstructs the prevailing narratives and reveals to understanding the interests that support them.

In this case, the methodological approach is aligned with a counter-hegemonic attitude, promoting Ukraine's independence and sovereignty in the face of external pressures. This methodological and epistemological perspective offers a conceptual framework for understanding how military actions and digitalization affect human capital, considering the political, economic and social dimensions of the conflict.

The hermeneutical interpretation of documents, based on the philosophy of Gadamer (2004), was used to reveal the meanings and interests that each author holds, consciously or unconsciously. In general, this tool facilitates the understanding of the particularities of the life horizon in which the authors are immersed, contextualizing their points of view and prejudices. Hermeneutics allows for a detailed interpretation of the debates about human capital in Ukraine, recognizing how the experiences of war and the phenomenon of digitalization are reflected and appreciated from different perspectives. As Brom (2003) argues, the critical view of the source's sheds light on a comprehensive and detailed understanding of the phenomenon being analyzed.

As a complement to the documentary sources, in December 2024, two open interviews were conducted with two NATO security and defense specialists in Kiev, who decided to remain anonymous for security reasons. These interviews provided relevant data on military tactics, geopolitical trends and the repercussions of the conflict on Ukrainian society. The Socratic maieutic tool was used, as explained by González and López (2016), to encourage critical reflection by specialists, guiding them through open and intelligent questions so that they could show their knowledge and points of view in a deeper and more relevant way in the dialogue. Maieutic enabled the acquisition of key data and a better understanding of the complexity of the situation in Ukraine.

To qualitatively explore how human capital in Ukraine has changed due to the war and increasing digitalization, the interviewees were asked the following questions: How has the war affected the skills and knowledge of the Ukrainian population, and what kind of education or training is needed to rebuild the country? How has digitalization transformed the labor market in Ukraine during the conflict, and what opportunities and challenges does it present for human capital? And how can the negative effects of migration, death, and psychological damage on Ukrainian human capital be mitigated, and what public policies can be implemented to promote the resilience and well-being of the population?

In addition, the impact of artificial intelligence (AI) on employment and productive activities in Ukraine was investigated. In the research team of the authors of the article, the following basic questions were raised: In which sectors and activities has AI replaced humans in Ukraine, and what are the consequences for human capital in terms of unemployment and inequality? What kind of skills and knowledge are needed to compete in an increasingly automated labor market, and how can these skills be acquired? And what steps can be taken to ensure that AI is used ethically and responsibly in Ukraine, and that it benefits the whole of society rather than exacerbating existing inequalities?

In operational terms, the methodological stages deployed included: (1) an exhaustive review of the existing literature on human capital, conflict and digitalization; (2) the selection and hermeneutical analysis of relevant documentary sources; (3) conducting open interviews with security and defense experts; (4) qualitative analysis of data collected through interviews and documentary sources; (5) the interpretation of the results in the light of critical geopolitics; and (6) the formulation of conclusions and recommendations for future research and for the design and development of public policies.

Any qualitative research on human capital development in large-scale military operations and digitalization requires a deep ethical commitment. As Taylor (1994) argues, in his ethics of authenticity, socially responsible researchers should prioritize the informed consent of participants, especially given the sensitive nature of the topics that are exposed to public consideration. Consequently, confidentiality and anonymity should be ensured to protect participants from potential repercussions, as was done with the interviews conducted with the two experts.

In this research and, especially in the drafting phase, it was deliberately sought to minimize any potential harm to the participants, considering the psychological stress related to war experiences, the disclosure of sensitive information, and the potential security risks associated with digitization. Therefore, an attempt was made to always maintain transparency regarding the objectives, methods and intended use of the research, avoiding distortions of reality or publishing unsupported information in the sources consulted. In addition, researchers are aware of their own biases and values. Up to the time of publication of the article, the objective and subjective conditions have been created for this research to contribute, as far as possible, to the well-being of military personnel and to the ethical improvement of human capital management practices in Ukraine.

ANALYSIS AND DISCUSSION OF RESULTS

Variable impact of the war

In principle, it should be clarified that this analysis was developed through a hermeneutical and maieutic dialogic exercise, combining the answers of the interviewed subjects with the information from the documentary sources and the opinion of the authors of the study. In line with the most widely disseminated qualitative studies (Martínez, 2009; Ray, 2003), it is recognized that the knowledge produced in the social sciences is, to a large extent, a synthesis of objective and subjective elements, assuming the biases inherent to the participants in the process of knowledge production. Ultimately, this view seeks to understand the complexity of the phenomenon studied from multiple perspectives, recognizing the validity of different interpretations and experiences.

For the purposes of the research, the interviewed subjects are cited and referred to simply as Expert 1 and Expert 2, to protect their personal identity. When asked: How has the war affected the skills and knowledge of the Ukrainian population, and what kind of training or training is needed to rebuild the country? Expert 1 (1, 2024) says that the war has largely devastated the skills and knowledge of the Ukrainian population. Many have lost their jobs and education has been disrupted. To rebuild the country, massive training is needed in areas such as construction, engineering and applied technologies, within the framework of a reconstruction plan that has the support of the European Union and the international community in general. Due to the magnitude of the damage, this plan must resemble what the Marshall Plan was for Europe at the end of the Second World War in 1948.

Expert 1 then responds that, based on his knowledge of the terrain, it is necessary to invest in psychological rehabilitation programs to address the generalized trauma of the population of the territories that have lived the experience of war in their own flesh. In the context of Ukraine's national reconstruction, the training of the skilled workforce should be practical and oriented to the needs of the labor market, with a focus on innovation and entrepreneurship (1, 2024), rather than on the humanities or social sciences.

As for the second question: How has digitalization transformed the labor market in Ukraine during the conflict, and what opportunities and challenges does it present for human capital? Expert 1 responds that digitalization has transformed the labor market, creating new opportunities in sectors such as technology, communication, and e-commerce. However, it has also created challenges, such as the digital divide and the constant need to acquire new national skills in security and defense and sustainable development. For its part, Expert 2 adds that collective access to technology and digital training must be guaranteed for all Ukrainians, especially for the most vulnerable groups in socioeconomic terms. If the risks of the digital gap can be reduced, public policies can be promoted that promote digital inclusion and the creation of quality jobs in the technology sector (1; 2, 2024).

When the difficult question was asked: How can the negative effects of migration, death, and psychological damage on Ukrainian human capital be mitigated, and what public policies can be implemented to promote the resilience and well-being of the population? Expert 1 categorically stated that, as in any war, migration, death and psychological damage have had a devastating impact on Ukrainian human capital. To mitigate these effects, social policies that promote family reunification, psychological support and social integration are needed. However, it may take several years to achieve successful effects in this dimension (1, 2024).

For his part, Expert 2: expressed that it is very useful to strengthen mental health systems and provide, consequently, support services to victims of war. In this effort, which is a fundamental part of any national reconstruction policy, it is necessary to implement programmed for the reintegration of refugees and internally displaced persons into the labour market, guaranteeing their access to education, housing and employment, in accordance with the standards and protocols of the United Nations and the European Union, as these are the most advanced in terms of what the restoration of the social fabric and the re-promotion of the apparatus mean national production.

Variable Artificial Intelligence

The sources consulted show that AI has begun to replace humans in some sectors in Ukraine, such as manufacturing, customer service, and data analytics (Goncharuk, 2024). This reality has raised concerns about unemployment and inequality, especially for lower-skilled workers. For cybersecurity and defense specialists like Goncharuk (2024):

Russia's full-scale war in Ukraine is the first international conflict in which the opposing sides have actively developed and used artificial intelligence (AI) for military purposes. AI solutions for geospatial intelligence, operations with unmanned systems, military training, and cyber warfare have been key to success on the battlefield. (Goncharuk, 2024, para. 1)

As in any war, the needs that are imposed on the battlefield demand the implementation of a technological agenda in innovation, as a condition of possibility to achieve victory or, at least, reduce the impact of the advance on the ground of the invading forces, consequently:

After two years of intense fighting, Ukraine and Russia are competing to improve existing defense solutions with AI and to develop new AI-powered systems. The war has forced Ukraine to focus on what works best on the battlefield to blunt the enemy's advantages while also considering future warfighting needs. This has led to a clear focus on providing the best solutions for frontline troops and developing a talent pipeline for technology development (Goncharuk, 2024, para. 10).

Everything indicates that, to succeed in an increasingly automated national and international work environment, skills such as critical reasoning, inventiveness, problem solving and the ability to adapt to digital transformations are required (Arbeláez-Campillo, Villasmil Espinoza, & Rojas-Bahamón, 2021). These competencies can be obtained through formal education, vocational training and autonomous learning. However, and following the criteria of Arbeláez-Campillo, et al. (2021) in their reflections on AI and the human condition, in all imaginable scenarios these technologies must be used ethically and responsibly in Ukraine, for which clear regulations and supervisory mechanisms must be defined by the legislative branch. In the face of the increasing digitalization of society, workers' rights must be protected, transparency and accountability must be promoted, and the benefits of AI must be equitably distributed.

TABLE 1. Variables with a significant impact on human capital.

Variable	Impact	Challenges	Opportunities	Remarks
Large-scale military operation	Loss of skills, disruption of education, psychological trauma, migration.	Reconstruction, re-habilitation, reintegration into the labour market, digital divide.	Mass training, innovation, entrepreneurship, digital inclusion.	To successfully face these opportunities and challenges, public policies that are up to the needs and aspirations of Ukrainian society are required.
Artificial Intelligence (AI)	Job replacement, task automation, increased productivity.	Unemployment, inequality, the need for new skills, ethics and responsibility.	New jobs, greater efficiency, development of new technologies, improvement of the quality of life.	AI doesn't have to be a problem for workers, if it's used ethically and for the benefit of social development in general.

Source: prepared by the authors (2025).

For the authors of this research, in addition to the above, strategic research capacities and the development of AI technologies must be promoted, which are adaptive to market needs and, at the same time, benefit the entire Ukrainian society, instead of exacerbating existing inequalities. For the achievement of this strategic objective, it is necessary to promote resolute collaboration between government, industry, academia and organized civil society to ensure, always, that AI is used for the common good and, even more, to build a more prosperous and just future for all Ukrainians who seek to live in peace and prosper in their own territory, without foreign taxation.

CONCLUSIONS AND RECOMMENDATIONS

The digital age, driven by artificial intelligence (AI), presents humanity with a forked path. Following the prospective criteria of Arbeláez-Campillo, et al. (2021), the first outcome, a dystopian future, envisions AI as an obstacle to the sustainable development of humanity. In this scenario, algorithmic control exacerbates inequalities, concentrates power in the hands of a few authoritarian elites, and dehumanizes work, leading to an ontological loss of autonomy and creativity. Unbridled automation could lead to mass unemployment, while algorithmic manipulation undermines social trust and the ability to make informed decisions. Ethics is eclipsed by utilitarian and pragmatic effi-

ciency, and the pursuit of short-term gain prevails over long-term human well-being, thus halting the true progress of civilization.

The second, more realistic scenario projects uneven adoption of AI globally. The impact of AI on the economy, politics, and social organization will vary significantly from country to country, depending on their goals, agendas, and regulations. Thus, some societies in the global north could leverage AI to improve economic efficiency, healthcare, and education, while others in the global south struggle with technological unemployment, social polarization, and the erosion of civil liberties. In this fragmented world, international south-south cooperation becomes necessary to address common challenges and ensure that AI benefits all of humanity, not just a few privileged groups and countries.

Thinking about the post-war Ukrainian context, human capital development faces unique challenges and opportunities. A pessimistic scenario could be a massive brain drain, a mental health crisis, and a declining economy, hampering national reconstruction. An optimistic scenario, on the other hand, envisions a revitalized and modern Ukraine, which invests heavily in education, innovation and technology, attracting human talent and becoming a regional center of technological development in Eastern Europe. The path Ukraine takes will depend on its strategic ability to tackle corruption, build strong democratic institutions, and foster a culture of entrepreneurship and constant innovation.

In this regard, to harness the potential of the digital age and foster the development of human talent, policymakers must take a proactive and comprehensive approach to human capital management. This includes: (a) investing in technology education and training to prepare workers for the jobs of the future; b) promoting digital inclusion and media literacy; c) regulate the use of AI to protect individual rights and privacy, and d) To promote innovation and entrepreneurship. Taken together, these recommendations are designed to create an environment that fosters collaboration between academia, industry and government, and promotes a culture of lifelong learning in new technologies.

Finally, this research recognizes its possible limitations. The complex and multifaceted nature of the topic, as well as the rapid evolution of technology, make it difficult to carry out a comprehensive and definitive analysis of it. Available data may be incomplete or biased, and future projections are inherently uncertain. At the same time, it is not ruled out that the philosophical perspectives adopted by the authors may negatively influence the interpretation of the results. Therefore, this research should be considered as a starting point for future explorations and debates on the subject, recognizing the epistemological need for an interdisciplinary bridge and continuous reflection that is never exhausted in a high-impact scientific article.

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ARTÍCULO DE INVESTIGACIÓN

Ecología de Saberes: Diálogos interculturales y discursos decoloniales para un desarrollo sostenible*

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Resumen. En el marco de las filosofías contrahegemónicas, la ecología de saberes representa una alternativa epistemológica viable al pensamiento científico dominante, valorizando el pluralismo y la justicia cognitiva. Bajo estas premisas, el objetivo de esta investigación fue examinar críticamente el diálogo de saberes como espacio epistemológico en el que se desarrollan encuentros interculturales y discursos decoloniales que, en el siglo XXI, apuestan por modelos políticos y económicos de desarrollo sostenible. Metodológicamente, se hizo uso de la investigación documental y de la entrevista abierta a un destacado filósofo de Europa del este. En las conclusiones se destaca que, la ecología de saberes, no se limita a la coexistencia epistémica, sino que exige una *ontología relacional combatiente* que desmonte las arquitecturas coloniales inscritas en los paradigmas de desarrollo hegemónico, como el socialismo científico o el capitalismo neoliberal. La militancia política aquí planteada, opera en tres frentes simultáneos: como *epistemología de la insumisión* que rechaza los criterios de validación científica

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eurocéntricos; como *pedagogía de la desobediencia* que convierte los diálogos interculturales en espacios de contrahegemonía y, como *ética de la vulnerabilidad compartida* que reconoce la interdependencia radical entre humanos y no-humanos en las ecologías del Sur Global.

Palabras clave: ecología de saberes, diálogos interculturales, discursos decoloniales, teoría social contemporánea, desarrollo sostenible.

Ecology of Knowledges: Intercultural dialogues and decolonial discourses for a sustainable development

Abstract. Within the framework of counter-hegemonic philosophies, the ecology of knowledge represents a viable epistemological alternative to the dominant scientific thought, valuing pluralism and cognitive justice. Under these premises, the objective of this research was to critically examine the dialogue of knowledge as an epistemological space in which intercultural encounters and decolonial discourses are developed that, in the 21st century, bet on political and economic models of sustainable development. Methodologically, use was made of documentary research and an open interview with a prominent Eastern European philosopher. The conclusions highlight that the ecology of knowledge is not limited to epistemic coexistence but demands a combative relational ontology that dismantles the colonial architectures inscribed in the paradigms of hegemonic development, such as scientific socialism or neoliberal capitalism. The political militancy proposed here operates on three simultaneous fronts: as an epistemology of insubmission that rejects Eurocentric criteria of scientific validation; as a pedagogy of disobedience that turns intercultural dialogues into spaces of counter-hegemony; and as an ethic of shared vulnerability that recognizes the radical interdependence between humans and non-humans in the ecologies of the Global South.

Keywords: ecology of knowledge, intercultural dialogues, decolonial discourses, contemporary social theory, sustainable development.

INTRODUCCIÓN

La propuesta epistemológica desarrollada por el sociólogo lusitano Boaventura de Sousa Santos (2006), configura un paradigma alternativo al modelo científico dominante mediante la promoción del pluralismo cognitivo y la equidad epistemológica. Esta construcción teórica, denominada la llamada “ecología de saberes”, la cual establece un marco conceptual que supera las limitaciones del racionalismo ortodoxo al integrar dimensiones emocionales y experienciales del conocimiento, legitimando así las formas locales de comprensión frente al universalismo eurocéntrico. Tal perspectiva reconfigura la tradicional asimetría sujeto-objeto hacia una interacción dialógica horizontal entre actores cognitivos equivalentes.

Esta formulación teórica emerge como respuesta crítica al fenómeno del “epistemicidio” característico de la modernidad occidental, proceso mediante el cual se han silenciado y descalificado sistemáticamente los sistemas de conocimiento originarios de poblaciones subalternizadas, particularmente de las comunidades originarias y afrodescendientes del hemisferio sur (De Sousa Santos,

2006). En este contexto, la ecología de saberes se inscribe dentro del paradigma más amplio de las Epistemologías del Sur, corriente que busca ampliar el horizonte político-intelectual más allá de las limitaciones conceptuales del Norte global, proporcionando en el proceso herramientas teórico-metodológicas para la construcción, articulación y validación de propuestas alternativas orientadas hacia una sociedad global más equitativa y diversa, donde la multiplicidad de voces constituya una realidad epistemológica tangible, como también plantea Lander (2008).

En el mundo de hoy, los procesos de intercambio intercultural y las narrativas decoloniales encuentran en esta propuesta epistemológica un terreno propicio para su materialización, dado que reconoce explícitamente la premisa fundamental que afirma: “La justicia social global resulta imposible sin la existencia de justicia cognitiva global” (De Sousa Santos, 2002, p. 25). Esta posición filosófica facilita la convergencia estratégica entre sistemas de conocimiento ancestrales y rurales con saberes científico-tecnológicos contemporáneos, promoviendo dinámicas emergentes de cooperación intercultural.

En líneas generales, dichas convergencias se concretan en iniciativas documentadas en territorios Nahuas y Popolucas de la Sierra de Santa Marta en Veracruz (México), donde experiencias interculturales operan como paradigmas alternativos de desarrollo destinados a transformar las condiciones ecológicas, demográficas y socioeconómicas desfavorables que caracterizan a estas comunidades mesoamericanas (Moreno, S/F). En su configuración esencial, la ecología de saberes se distingue del pensamiento complejo por su compromiso explícito con los conocimientos generados por movimientos sociales en sus procesos de resistencia, ante las múltiples manifestaciones del colonialismo contemporáneo, fenómenos tanto materiales como simbólicos que se correlacionan con un sistema económico que prioriza la lógica mercantil sobre la preservación de la vida (Boaventura de Sousa, 2019).

Ante la impronta de estas problemáticas, la presente investigación se propuso examinar críticamente el diálogo de saberes como espacio epistemológico en el que se desarrollan encuentros interculturales y discursos decoloniales que, en el siglo XXI, apuestan por modelos políticos y económicos de desarrollo sostenible. A partir de este propósito central, emergen tres cuestionamientos seminales:

- ¿Mediante qué mecanismos la ecología de saberes interpela las jerarquías y exclusiones ontológicas y epistémicas fundamentadas en el racismo estructural, manifestadas como expresiones de colonialidad?
- ¿De qué manera los intercambios interculturales, fundamentados en una ecología de saberes, pueden contribuir a la transformación de los sistemas de evaluación científica, preservando simultáneamente el carácter público y académico de la ciencia mientras garantizan equidad y justicia social?
- ¿Qué experiencias específicas de diálogo de saberes y cooperación intercultural han logrado constituirse como alternativas viables al desarrollo convencional, promoviendo la sustentabilidad integral en comunidades marginalizadas?

Las interrogantes planteadas guían la indagación sobre las convergencias entre distintos sistemas de conocimiento y su capacidad para incidir de manera significativa en la transformación de realidades concretas y plurales, trascendiendo los límites impuestos por la modernidad occidental.

En cuanto a la estructura de la presente investigación, esta se organiza en cinco secciones articuladas en función del objetivo general. La primera sección, expone los fundamentos teóricos del trabajo, abordando los conceptos de ecología de saberes, interculturalidad y decolonialidad desde una perspectiva multidisciplinaria. La segunda sección, describe el enfoque metodológico adoptado, detallando los criterios y procedimientos empleados en el análisis crítico de las fuentes seleccionadas. En la tercera sección, se realiza un ejercicio analítico y reflexivo, en el que se discuten los resultados obtenidos a partir del examen de casos concretos donde la ecología de saberes ha propiciado procesos de transformación social y económica. La cuarta sección presenta las conclusiones y recomendaciones derivadas del estudio, destacando tanto el potencial como las limitaciones de los diálogos interculturales en la promoción de un desarrollo sostenible y equitativo. Finalmente, se incluye un apartado de referencias bibliográficas ordenadas alfabéticamente, integrando únicamente fuentes académicas de reconocido prestigio en el ámbito de las ciencias sociales.

MARCO TEÓRICO

La propuesta epistemológica desarrollada por Boaventura de Sousa Santos (2002; 2006) constituye el núcleo conceptual de su corpus teórico, al plantear una fractura radical respecto al modelo científico hegemónico que ha funcionado históricamente como mecanismo de dominación cognitiva. Las Epistemologías del Sur, formuladas por este autor (2006), buscan expandir el horizonte de la imaginación política trascendiendo el estancamiento intelectual y político característico del Norte global, con el propósito de ampliar las alternativas para reinterpretar la realidad social desde los conocimientos y prácticas del hemisferio sur, confrontando así los procesos de epistemicidio, lingüicidio y subalternización epistémica.

Según Santos (2019), esta construcción epistemológica reconoce que la comprensión del mundo trasciende la interpretación parcializada eurocéntrica de la historia, estableciendo como fundamento ético la premisa de que la justicia social global resulta inalcanzable sin la existencia simultánea de justicia cognitiva global. En este particular, resulta importante aclarar que esta propuesta no implica el rechazo categórico del conocimiento científico convencional, sino que promueve su incorporación dentro de un ecosistema cognoscitivo más amplio, donde el intercambio dialéctico y la confrontación crítica entre diversos sistemas de conocimiento se torna factible. De esta manera, se cuestionan las “monoculturas del saber” que han definido el proyecto de la modernidad occidental. En síntesis:

La ecología de saberes se opone a la lógica de la monocultura del conocimiento y del rigor científico, e identifica otros saberes y criterios de rigor y validez que operan de forma creíble en prácticas sociales que la razón metonímica declara no existentes. En este sentido, la idea central de la sociología de las ausencias es que no existen la ignorancia ni el conocimiento en general. Toda ignorancia lo es respecto de un determinado tipo de conocimiento, y todo conocimiento es la superación de una ignorancia particular. (Boaventura de Sousa, 2019, p. 229).

Como se desprende de la reflexión precedente, ningún sistema cognitivo, independientemente de sus aspiraciones totalizadoras, logra trascender completamente las limitaciones de la ignorancia humana. En este marco conceptual, los encuentros interculturales se configuran como espacios de convergencia donde múltiples epistemologías establecen relaciones de intercambio fundamentadas en el reconocimiento recíproco y la equidad cognitiva.

La implementación práctica de estos principios epistemológicos implica comprender ontológicamente que: “Más allá del discurso dominante, la interculturalidad permanece como un constructo teórico en desarrollo y una praxis institucional circunscrita, que demanda reflexión crítica y voluntad política para consolidarse como principio fundacional de una sociedad plural” (De Sousa Santos, 2002, p. 29).

Desde la perspectiva de los investigadores, situados fuera del contexto latinoamericano, la experiencia intercultural evidencia las tensiones y contradicciones dialécticas que surgen en el ámbito educativo ante el establecimiento de espacios dialogales entre saberes ancestrales y científicos contemporáneos. Esta dinámica revela los impedimentos estructurales que obstaculizan la implementación efectiva de paradigmas educativos interculturales, incluso en contextos societales caracterizados por su diversidad multicultural y multiétnica. Como argumenta Taylor (1994), los intercambios interculturales genuinos demandan una transformación sustancial de las instituciones y prácticas sociales, así como un compromiso ético-político con la pluralidad epistémica como prerequisite para la edificación de sociedades democráticas multiculturales.

En el contexto contemporáneo, las narrativas decoloniales emergen como críticas sistémicas a las estructuras de poder legadas por el colonialismo, las cuales continúan operando en las dimensiones política, económica, cultural y epistemológica del hemisferio sur. Según Sánchez-Tarragó (2021), la producción científica latinoamericana de acceso abierto enfrenta retos significativos desde una óptica decolonial. Aunque América Latina ha liderado iniciativas pioneras en acceso abierto y ha desarrollado sistemas regionales colaborativos para la socialización del conocimiento, como bien común —tales como LATINDEX o REDALYC—, los mecanismos de evaluación científica continúan privilegiando las publicaciones denominadas “internacionales”, legitimadas por los índices como WOS o Scopus.

Paralelamente, las estrategias de comercialización del acceso abierto se intensifican progresivamente, amenazando con subvertir los propósitos originales del Movimiento de Acceso Abierto y generando brechas más profundas entre el Norte y el Sur global, como señala Science Europe Principles on Open Access to Research Publications (2015). Esta situación evidencia la persistencia de jerarquías y exclusiones ontológicas y epistémicas fundamentadas en el racismo estructural, fenómenos que los teóricos decoloniales conceptualizan como *colonialidades*, requiriendo una “desobediencia epistémica” como postura decolonial (De Sousa Santos, 2006).

La impugnación del paradigma tradicional de desarrollo se constituye como eje articulador entre la ecología de saberes y las narrativas decoloniales. Según Nussbaum (2012), en las últimas décadas, tanto la economía del desarrollo como los estudios de desarrollo en general —concebidos como el examen de las condiciones materiales y culturales que promueven el progreso y el bienestar humano en contextos societales específicos— han experimentado una crisis paradigmática significativa. Esta situación crítica ha catalizado la emergencia de marcos alternativos que cuestionan la perspectiva lineal y eurocéntrica del desarrollo, integrando propuestas como las capacidades humanas de Sen (2009), el Buen Vivir/Sumak Kawsay de los pueblos andinos incorporado en la Constitución Política de Ecuador (Asamblea Nacional Constituyente, 2008), y el concepto africano de Ubuntu (Fanon, 2004).

En este marco conceptual, la ciencia abierta se configura como una necesidad inherente a todas las civilizaciones humanas que, trascendiendo motivaciones altruistas o recomendaciones políticas, se ha constituido en un imperativo ético respaldado por marcos normativos internacionales, según

argumenta Merlo (2017). Este paradigma representa un espacio propicio para la implementación sostenida de prácticas de ecología de saberes. Los repositorios institucionales, especialmente en el contexto latinoamericano, han evolucionado como estrategias nacionales de acceso abierto, democratizando el conocimiento y propiciando el intercambio entre diversos sistemas epistémicos, con importantes implicaciones político-ideológicas para la democratización del conocimiento en general (Merlo, 2017).

Queda claro que, la ecología de saberes, los encuentros interculturales y los discursos decoloniales confluyen en la formulación de alternativas frente al modelo hegemónico de desarrollo, tanto en su variante capitalista como socialista marxista, configurando senderos hacia sociedades más equitativas, sostenibles y epistemológicamente plurales (Boaventura de Sousa, 2019). Este proceso liberador del pensamiento demanda trascender las jerarquías cognitivas establecidas por la colonialidad del poder, del saber y del ser, lo que requiere, desde nuestra perspectiva analítica, una reconfiguración radical de las instituciones educativas, científicas y políticas del Sur Global.

Las iniciativas concretas de intercambio de saberes en contextos interculturales evidencian la viabilidad de articular conocimientos diversos para enfrentar problemáticas socioambientales complejas, tal como ejemplifica la Constitución Política del Ecuador (2008). La desobediencia epistémica propuesta por los enfoques decoloniales se materializa en proyectos que confrontan la mercantilización del conocimiento y reivindican su naturaleza de bien común (Nussbaum, 2016).

En este orden de ideas, los retos contemporáneos, desde la crisis climática hasta las desigualdades sociales persistentes, demandan una ecología de saberes que reconozca la multiplicidad de conocimientos y experiencias humanas como patrimonio esencial para la construcción de futuros alternativos. Esta perspectiva invita a reimaginar las relaciones entre naturaleza y cultura, ciencia y tradición, Norte y Sur global, hacia un horizonte de coexistencia fundamentado en el reconocimiento recíproco y la justicia cognitiva, evitando caer en un relativismo cultural o moral que equipare indiscriminadamente todos los saberes sin considerar su contenido específico.

CUADRO 1. Síntesis argumentativa conceptual de las categorías investigadas.

Autores	Dimensión Epistemológica	Ecología de Saberes	Diálogos Interculturales	Discursos Decoloniales
(Boaventura de Sousa, 2019).	Bases conceptuales.	Pluralismo cognitivo contra epistemicidios.	Horizontalidad en la construcción de conocimientos	Crítica a la colonialidad del ser/saber occidentalizante.
(De Sousa Santos, 2002). (Gulac, Marchenko, Kapitanenko, Kuris, & Oleksenko, 2022)	Relación metodológica.	Intento de integración de saberes científicos con los saberes ancestrales.	Traducción intercultural como praxis transformadora para una comprensión más completa de la propia realidad (hermenéutica diatópica).	Desobediencia epistémica contra el extractivismo de la planificación central de la economía o del mercado.
(Organización de Naciones Unidas, 2022).	Aporte al desarrollo sostenible de la humanidad.	Sustentabilidad como garantía de la dignidad humana y de la dignidad de la vida en general.	Modelos híbridos de gestión biocultural.	Ontologías relacionales del Buen Vivir.

Fuente: Elaborado por los autores (2025).

La configuración tripartita epistemológica presentada en el Cuadro 1 —conformada por la Ecología de Saberes, los Diálogos Interculturales y los Discursos Decoloniales— constituye un sistema integrado de resistencia cognitiva, donde la ecología de saberes funciona como estructura descolonizadora que desestabiliza los cimientos ontológicos y epistemológicos del paradigma desarrollista moderno. En este marco analítico, los intercambios interculturales concretan esta ecología a través de una interpretación hermenéutica transcultural, convirtiendo el proceso comunicativo en un mecanismo político destinado a rearticular fragmentos de conocimientos marginalizados por las estructuras de poder coloniales, tanto materiales como simbólicas.

Los discursos decoloniales, desde su posicionamiento crítico radical, evidencian cómo las categorías hegemónicas de “sostenibilidad” reproducen dinámicas extractivas bajo nuevas formulaciones ambientalistas, proponiendo alternativamente epistemologías reparadoras que transforman las fracturas coloniales en instrumentos de navegación para abordar la crisis civilizatoria generada por las contradicciones materiales y culturales del Occidente dominante y sus periferias. Esta constelación conceptual no solo cuestiona los supuestos antropocéntricos del desarrollo moderno, sino que reconfigura la relación saber-poder como un ecosistema simbiótico donde los conocimientos científicos, ancestrales y comunitarios establecen relaciones de apoyo mutuo. Este proceso genera marcos éticos para una gobernanza ecológica fundamentada en la reciprocidad epistémica, priorizando esta dinámica por encima de la lógica de rentabilidad económica del mercado.

En este sentido, la propuesta teórica aquí desarrollada trasciende la crítica para ofrecer alternativas constructivas que integran múltiples formas de conocimiento en la búsqueda de soluciones sostenibles y equitativas a los desafíos contemporáneos, estableciendo nuevos parámetros para la producción y validación del conocimiento en el contexto de las sociedades postcoloniales.

METODOLOGÍA

La presente investigación se desarrolló mediante un análisis documental exhaustivo en conformidad con los criterios establecidos por la American Educational Research Association (2025), centrándose en la revisión de publicaciones académicas con evaluación por pares, seleccionadas en función de su pertinencia para la filosofía política y los estudios decoloniales. El corpus documental se conformó prioritariamente con producciones científicas disponibles en formato digital, indexadas en bases de datos de reconocido prestigio como Scopus y Web of Science, complementadas con monografías especializadas que examinan críticamente la ecología de saberes.

Este procedimiento de revisión sistemática facilitó la reconstrucción de debates teóricos clave en términos de teoría social contemporánea, destacando particularmente la tensión dialéctica entre el universalismo científico y el pluralismo epistémico. Aquí, se emplearon exclusivamente fuentes que satisfacen los criterios internacionales de rigor académico. El acervo bibliográfico incorporó obras de referencia de autores como Boaventura de Sousa Santos y Samuel Huntington, cuyas aportaciones han sido reconocidas y validadas por las comunidades académicas internacionales.

Diseño metodológico cualitativo

Complementariamente, se implementaron entrevistas semiestructuradas con un especialista en filosofía de la ecología de saberes, concebidas como encuentros dialógicos horizontales que desarticulan la tradicional asimetría entre investigador y participante.

Esta aproximación metodológica, recomendada en la literatura decolonial para prevenir el extractivismo¹ epistémico (Grosfoguel, 2016), posibilitó la exploración de las dimensiones aplicadas de los constructos teóricos bajo estudio. Los testimonios obtenidos fueron transcritos íntegramente y sometidos a análisis mediante codificación temática, proceso que permitió identificar categorías conceptuales centrales como “justicia cognitiva” y “ontologías relacionales”, las cuales enriquecieron sustancialmente el marco hermenéutico de la investigación.

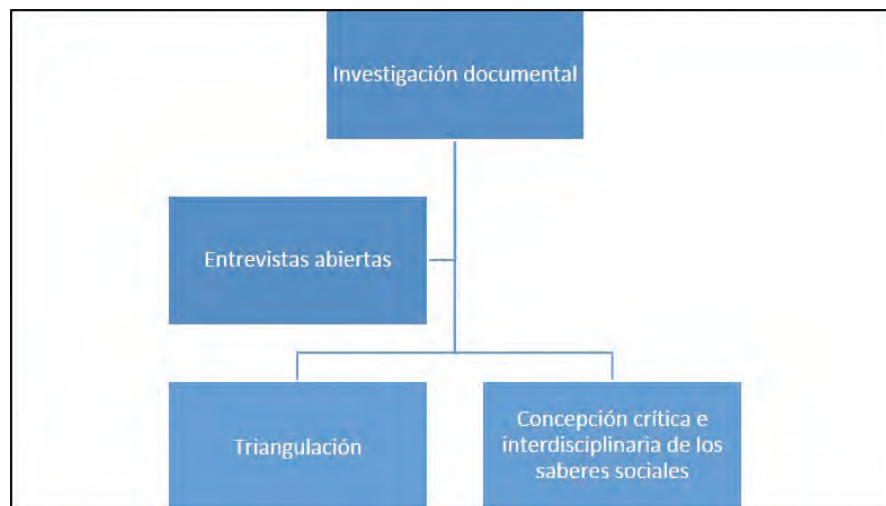
Estructura procedimental

El desarrollo investigativo se organizó en tres etapas iterativas: (1) cartografía conceptual a través de revisión sistemática del material bibliográfico seleccionado; (2) confrontación teórico-empírica mediante análisis de casos; y (3) síntesis crítica con triangulación de resultados. Cada etapa incorporó procesos de validación interdisciplinaria mediante intercambios con expertos en antropología y filosofía de la ciencia, vinculados al proyecto “*Transformation of the tourism and recreation industry of the region in modern conditions*” de la Universidad Nacional de Uzhhorod, garantizando así la coherencia entre el aparato teórico y el análisis empírico. Esta arquitectura metodológica adaptativa permitió la integración de hallazgos emergentes manteniendo la coherencia temática del estudio.

El andamiaje cognitivo de este estudio se apoyó en la triangulación metodológica, entendida —siguiendo a Aveling, Gillespie y Cornish (2015)— como la integración equitativa de análisis crítico del discurso en documentos, interpretación hermenéutica de entrevistas y la reflexividad constante del equipo de investigación. Este enfoque, de naturaleza multifacética y fundamentado en los principios de la investigación-acción participativa, posibilita una aproximación holística y profunda al fenómeno filosófico investigado. La convergencia de distintas perspectivas teóricas y metodológicas permitió identificar tensiones fecundas entre los postulados de la teoría decolonial y las prácticas institucionales contemporáneas, enriqueciendo así la comprensión del objeto de estudio.

Los investigadores que suscriben este estudio sostienen que futuras indagaciones podrían abordar, desde sus propias perspectivas, las convergencias con la ética en inteligencia artificial, explorando cómo los algoritmos inteligentes podrían incorporar, por ejemplo, los principios de la ecología de saberes en diversas disciplinas. Otra línea de investigación prometedora que anticipamos examinaría los protocolos de propiedad intelectual colectiva para la protección de conocimientos ancestrales en el sector farmacéutico. Finalmente, se plantea que la neurociencia intercultural brinda oportunidades valiosas para investigar las bases cognitivas implicadas en la traducción entre distintos saberes, ampliando así el alcance transdisciplinar de este campo que integra epistemología y teoría social crítica.

¹En palabras de Grosfoguel (2016), explica que: “...Lianne Betasamosake Simpson toma el concepto de «extractivismo» y lo extiende a nuevos territorios epistémicos para caracterizar una actitud frente al conocimiento. Ella usa aquí el ejemplo del proyecto de Naciones Unidas sobre Medio Ambiente y Desarrollo, donde se apropian las ideas de los pueblos indígenas del mundo para colonizarlas asimilándolas al conocimiento occidental. Al asimilar, es decir, al subsumir estos conocimientos de los pueblos al conocimiento occidental se les quita la radicalidad política y la cosmogonía crítica «alternativa», para mercadearlos mejor o simplemente extraerlos de una matriz epistémica más radical para despolitizarlos” (Grosfoguel, 2016, p. 14).

CUADRO 2. Arquitectura metodológica de la investigación.

Fuente: Elaborado por los autores (2025), siguiendo las coordenadas de la obra de (Gulac *et al.*, 2022).

ANÁLISIS Y DISCUSIÓN DE RESULTADOS:

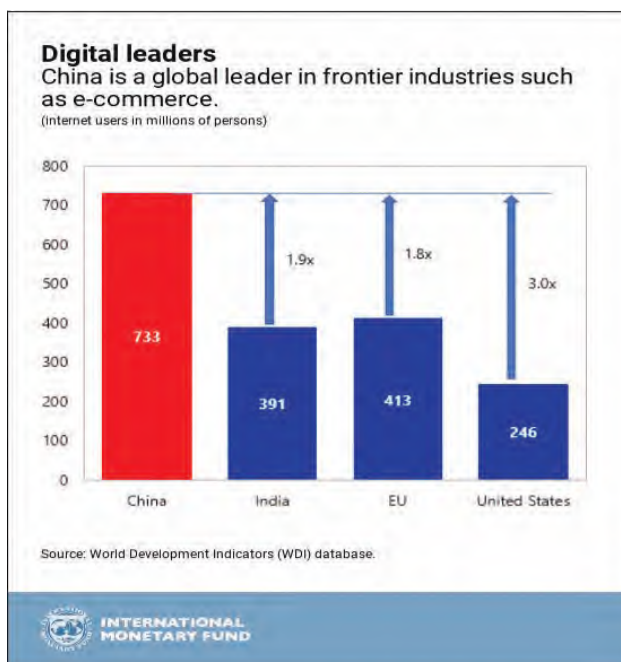
Ecología de saberes y transformaciones en contextos macro y micro

• China y la geopolítica del conocimiento: Un modelo civilizatorio alternativo

La proyección de China como actor hegemónico durante el siglo XXI, mediante la implementación del paradigma propio denominado “socialismo con características chinas”, constituye un ejemplo paradigmático de cómo la ecología de saberes puede expandirse desde contextos locales hacia dimensiones civilizatorias. Esta configuración geopolítica, analizada desde la perspectiva teórica de Huntington (2001), sobre las tensiones intercivilizatorias, ha resultado en la construcción de una hibridación epistemológica que articula la planificación centralizada socialista, las dinámicas del libre mercado y la innovación tecnológica de frontera, cuestionando así la hegemonía occidental en los modelos de desarrollo.

En este sentido, los indicadores económicos del Fondo Monetario Internacional evidencian una transformación económica sustancial: el Producto Interno Bruto chino experimentó una expansión desde 1.2 billones de dólares estadounidenses en el año 2000 hasta alcanzar 14.7 billones en 2020. Simultáneamente, el posicionamiento tecnológico del país asiático ha experimentado una reconfiguración radical, transitando de ejercer liderazgo en 3 de 64 áreas tecnológicas críticas durante el período 2003-2007, a consolidar su dominio en 57 de 64 sectores entre 2019-2023 (Saber, 2022).

En líneas generales, esta transformación estructural se fundamenta en una arquitectura epistémica estratégica que converge tres dimensiones fundamentales: la experticia tecnocrática de las élites gubernamentales, la capacidad innovadora del sector empresarial privado en el ámbito digital, y la integración de principios confucianos orientados hacia la cohesión social. El proyecto desarrollista chino ha logrado materializar, por lo tanto, una síntesis histórica entre infraestructuras contemporáneas y las ancestrales redes comerciales de la Ruta de la Seda, generando configuraciones de intercambio que están redefiniendo las dinámicas geopolíticas del conocimiento global (Liu, 2019).

CUADRO 3. Liderazgo mundial de China en industrias de vanguardia y comercio electrónico.

Fuente: Citado por Saber (2022).

El notable avance de China desafía la tradicional división Norte-Sur dentro del marco de la ecología de saberes, evidenciando que las civilizaciones no occidentales son capaces de desarrollar modelos epistemológicos alternativos sin someterse al universalismo liberal, tal como plantea Boaventura de Sousa (2019). En este sentido, el concepto de “desarrollo compartido” (共享发展), formulado por Liu (2019), propone una perspectiva integradora que vincula el crecimiento económico con la justicia social a través de mecanismos de redistribución cognitiva. Gracias a este enfoque, China logró disminuir la pobreza extrema del 66.3% en 1990 a apenas 0.3% en 2018, al mismo tiempo que impulsaba sectores tecnológicos avanzados como la inteligencia artificial y las energías renovables (Liu, 2019). La enseñanza geopolítica que se desprende es evidente. La ecología de saberes no pertenece exclusivamente a comunidades marginadas, sino que constituye una herramienta estratégica para reconfigurar las jerarquías globales del conocimiento y el poder en el contexto del siglo XXI.

- **Diálogo con un filósofo europeo del Sur Global sobre los Desafíos epistémicos y alternativos decoloniales**

Con el propósito de trascender las limitaciones inherentes a la investigación exclusivamente documental, el equipo investigador realizó una entrevista en profundidad con el filósofo ucraniano Roman Oleksenko², reconocido especialista en esta temática del pensamiento filosófico contrahegemónico.

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Respecto al primer interrogante sobre los mecanismos mediante los cuales la ecología de saberes interpela las jerarquías y exclusiones ontológicas y epistémicas fundamentadas en el racismo estructural, Oleksenko (2025), sostiene que esta propuesta epistemológica desestabiliza las “ontologías monolíticas” del racismo epistémico occidental mediante el reconocimiento de la multiplicidad cognitiva presente en los territorios subalternizados. Según su perspectiva, la cartografía colaborativa entre conocimientos ancestrales y técnicas agronómicas contemporáneas ha facilitado el diseño de sistemas agroforestales que incrementan sustancialmente la productividad agrícola, mientras regeneran los suelos degradados, particularmente en el sudeste asiático. Esta experiencia demuestra que la justicia cognitiva demanda la deconstrucción de los criterios de validación científica que, en la era digital, privilegian las publicaciones indexadas en WOS o Scopus por encima de los saberes ancestrales desarrollados mediante prácticas comunitarias.

En relación con el segundo cuestionamiento sobre las contribuciones de los diálogos interculturales a la transformación de los sistemas de evaluación científica, el entrevistado argumenta que, desde una perspectiva ontológica, dichos sistemas deben integrar protocolos interculturales similares a los implementados en China, donde las investigaciones se validan tanto por comités académicos como por asambleas comunitarias. Esta práctica, simultáneamente académica y cultural, expande la conceptualización del rigor metodológico al incorporar indicadores de impacto socioambiental y pertinencia cultural del conocimiento. El modelo chino ilustra cómo la educación universitaria intercultural (occidental-oriental) consolida la identidad profesional de los docentes, quienes operan como mediadores entre sistemas de conocimiento diversos (modernos y tradicionales) en sus prácticas pedagógicas cotidianas (Oleksenko, 2025).

Finalmente, al abordar la pregunta sobre qué experiencias específicas de diálogo de saberes y colaboración intercultural se han consolidado como alternativas viables al modelo de desarrollo convencional, favoreciendo la sustentabilidad integral en comunidades marginadas, se resaltó el caso emblemático de China en el ámbito civilizacional. En el plano local, se mencionó el Proyecto *Amawtay Wasi* en Ecuador, que ilustra cómo los diálogos interculturales pueden originar modelos educativos alternativos. En esta iniciativa, la cosmovisión andina del *Sumak Kawsay* se articula con pedagogías críticas para diseñar currículos que integran la sostenibilidad ambiental con la justicia cognitiva, formando líderes capaces de interactuar con gobiernos y empresas extractivas (Oleksenko, 2025, p. 2). Estos ejemplos, tanto a nivel macro como micro, demuestran que la viabilidad de alternativas al desarrollo convencional propio de la modernidad occidental depende de la creación de instituciones epistémicas híbridas que actúen como puentes entre saberes diversos y divergentes.

• Lecciones históricas de la ecología de saberes como constante civilizatoria

La civilización helénica, comúnmente idealizada como el origen primigenio del pensamiento racional occidental, desarrolló su corpus filosófico mediante procesos de intercambio epistémico transcontinental con tradiciones intelectuales egipcias, mesopotámicas y persas. Este fenómeno de hibridación cognitiva se ejemplifica en figuras como Tales de Mileto, quien desarrolló sus conocimientos geométricos durante su estancia en Memphis, y Pitágoras, quien articuló una síntesis innovadora entre la tradición matemática babilónica y elementos místicos órficos. Según Copleston (2004), esta dinámica de integración epistemológica, comparable con los marcos teóricos contemporáneos de la ecología de saberes, facilitó que la civilización griega trascendiera sus restricciones materiales a través de un activo intercambio intelectual.

En el contexto actual, la recuperación de esta perspectiva histórica revela que la ecología de saberes no constituye una propuesta epistemológica enteramente novedosa, sino más bien la revitalización de un principio civilizatorio históricamente documentado: la continuidad epistémica de las sociedades depende fundamentalmente de su capacidad para interpretar, traducir y asimilar sistemas de conocimiento externos, independientemente de su proximidad geográfica o cultural.

De Sousa Santos (2006), en su obra “Sociología de las Ausencias y Sociología de las Emergencias: para una ecología de saberes”, argumenta que los desafíos contemporáneos demandan la reactivación de este ethos civilizatorio mediante la construcción de “redes cognitivas transnacionales” donde instituciones universitarias, organizaciones comunitarias y estructuras estatales establezcan nuevos protocolos para la producción y legitimación del conocimiento. Esta aproximación resulta indispensable para abordar fenómenos complejos como la crisis climática global, que requieren la articulación dialéctica entre dimensiones locales y globales, tradiciones ancestrales y paradigmas de la modernidad, todo ello enmarcado en principios de justicia epistémica.

CONCLUSIONES

Es preciso aclarar que esta conclusión no pretende meramente reiterar o condensar la información analizada en las páginas precedentes, sino que adopta una perspectiva comprometida y crítica. Los investigadores que suscriben este estudio argumentan que la ecología de saberes se configura como un acto de insurgencia epistémica que trasciende el ámbito académico convencional para constituirse en una praxis transformadora —distinta de la concepción marxista de revolución— donde la defensa de la pluralidad cognitiva se articula con la resistencia frente a múltiples componentes de la racionalidad moderna dominante.

Por las razones esgrimidas, esta perspectiva trasciende la simple coexistencia de sistemas de conocimiento, demandando una ontología relacional activa que desarticule las estructuras cognitivas coloniales inscritas en los paradigmas hegemónicos de desarrollo, tales como el socialismo científico y el capitalismo neoliberal. La propuesta político-académica aquí planteada opera en tres dimensiones simultáneas: como epistemología de la resistencia que cuestiona los criterios eurocéntricos de validación científica (Boaventura de Sousa, 2019); como pedagogía crítica que transforma los diálogos interculturales en espacios contrahegemónicos (Freire, 2008); y como ética de la interdependencia que reconoce las conexiones fundamentales entre humanos y no humanos en las ecologías del Sur global (Singer, 2023; Nussbaum, 2012).

Respecto al significado de la teoría social en el siglo XXI, tanto como orientación para la acción transformadora como modelo interpretativo de la realidad, la potencia disruptiva de esta propuesta radica en su capacidad para superar la dicotomía tradicional entre teoría y praxis. Esta superación convierte los conocimientos ancestrales de comunidades históricamente marginadas en instrumentos poderosos contra el epistemicidio. Las experiencias de comunidades locales y civilizaciones no occidentalizadas —incluyendo el caso chino— deben comprenderse no como manifestaciones folclóricas o “saberes locales” circunscritos, sino como tecnologías políticas de resistencia que reconfiguran la sustentabilidad desde una lógica de cuidado recíproco con los sistemas naturales.

En este orden de ideas, frente a la mercantilización neoliberal del conocimiento abierto, la ecología de saberes propone una economía cognitiva alternativa fundamentada en principios de reciprocidad andina (*ayni*) y comunalidad africana (*ubuntu*), donde la circulación de conocimientos se constituye en un acto de solidaridad intercontinental (De Sousa Santos, 2002).

Esta propuesta demanda reconceptualizar la militancia ambiental desde una “geoepistemología de las heridas históricas”, evocando el pensamiento de Fanon (2004), que concibe las fracturas coloniales no como vestigios del pasado, sino como cartografías vivas para navegar los conflictos epistemológicos contemporáneos. La sustentabilidad auténtica solo puede emerger de una episteme reparadora que, siguiendo a Fanon (2004), transforme la memoria de la violencia colonial en potencia generadora de nuevos imaginarios ecológicos. Por lo demás, en este marco conceptual, los diálogos interculturales trascienden los ejercicios de tolerancia multicultural para convertirse en Asambleas Constituyentes Cognitivas, donde los protocolos de consulta se reinventan como parlamentos bioculturales con capacidad decisoria vinculante.

En términos de lo que significan los desafíos civilizacionales del siglo XXI, como la crisis climática actual, que podría precipitar el colapso civilizatorio según lo documentado por Diamond (2007), demanda una ecología de saberes transformadora que articule la ciencia crítica con las epistemologías territoriales, generando redes de inteligencia colectiva capaces de desafiar los algoritmos del capitalismo verde. Esta perspectiva epistémica encuentra su máxima expresión en el concepto de ciudadanía ecológica radical, donde el derecho a la existencia de los ecosistemas se materializa mediante prácticas comunitarias de vigilancia epistémica frente a proyectos extractivistas, independientemente de su orientación ideológica.

Definitivamente, el desafío histórico del siglo XXI consiste en transformar la ecología de saberes en un movimiento articulador que, desde espacios de pensamiento alternativo, construya una nueva configuración internacional de epistemologías históricamente marginadas, para redefinir fundamentalmente el concepto de desarrollo como arte colectivo de cohabitar sustentablemente el planeta.

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ARTÍCULO DE INVESTIGACIÓN

El papel de la cultura del lugar de trabajo en la integración social del empleado: Estudio de un caso práctico

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Resumen. La cultura corporativa ha sido objeto de atención durante muchos años y se reconoce cada vez más como un factor clave que da forma a la identidad única de las organizaciones. Permite a las empresas destacar, atraer a empleados con talento y fidelizar a sus clientes. Este estudio pretende elaborar recomendaciones para mejorar la cultura corporativa de las grandes empresas identificando la relación entre la cultura corporativa y los valores individuales de los empleados. El estudio de caso está representado por el mayor banco privado de Rusia, Alfa-Bank. Los métodos de investigación primaria incluyeron encuestas a empleados y entrevistas en profundidad, acompañadas de un análisis cuantitativo y cualitativo de los resultados. Las recomendaciones incluyen mejorar el proceso de incorporación, abordar la cuestión de las horas extraordinarias, implantar sistemas en línea para presentar solicitudes de dotación de personal y pago de horas extraordinarias, y organizar reuniones, sesiones de intercambio de ideas y programas de formación para fomentar el potencial creativo de los empleados. Los resultados serán valiosos para ejecutivos y profesionales de RRHH de grandes empresas, así como para consultores empresariales e investigadores académicos interesados en mejorar la cultura corporativa y explorar la relación entre los valores corporativos e individuales dentro de las organizaciones.

Palabras clave: cultura empresarial, valores individuales, capital humano, mejora de la cultura empresarial.

The role of workplace culture in social integration of employee: Case study

Abstract. Corporate culture has been a subject of attention for many years and is increasingly recognized as a key factor shaping the unique identity of organizations. It enables companies to stand out, attract talented employees, and build a loyal customer base. This study aims to develop recommendations for improving the corporate culture of large corporations by identifying the relationship between corporate culture and individual employee values. The case study is represented by Russia's largest private bank, Alfa-Bank. The primary research methods included employee surveys and in-depth interviews, accompanied by quantitative and qualitative analysis of the results. The recommendations include improving the onboarding process, addressing the issue of overtime, implementing online systems for submitting staffing and overtime payment requests, and organizing meetups, brainstorming sessions, and training programs to foster the creative potential of employees. The results will be valuable to executives and HR professionals in large corporations, as well as business consultants and academic researchers interested in enhancing corporate culture and exploring the relationship between corporate and individual values within organizations.

Key words: corporate culture, individual values, human capital, improvement of corporate culture.

INTRODUCTION

The academic community has not formed a unified approach to the relationship between corporate culture and employee values (Kurgansky et al., 2022; Zueva et al., 2022). Research in this area is typically conducted either from the company's perspective or with a focus on employee loyalty and satisfaction. While various methods exist for assessing employee values-based orientations, their interrelation often depends on the specific framework adopted by different scholars (Kochetkova, 2024).

This study aims to develop recommendations for improving the corporate culture of large corporations by identifying the relationship between corporate culture and individual employee values. The research object is Russia's largest private bank, Alfa-Bank. The research subject is the relationship between Alfa-Bank's corporate culture and the individual values of its employees.

The study set out the following tasks:

- 1) To explore the theoretical foundations of the concepts of corporate culture and individual employee values;
- 2) To analyze the corporate culture and the individual values of employees and managers within a large corporation;
- 3) To assess the degree of alignment between the corporate culture and the individual values of the corporation's employees;
- 4) To develop recommendations for shaping a corporate culture responsive to internal and external changes and consider the influence of individual employee values.

The study addresses a range of issues, including various approaches to defining corporate culture, the characteristics of different cultural types, and the methods for forming, maintaining, and improving corporate culture. Furthermore, it highlights the importance of examining employees’ values and their potential impact on organizational performance.

The results may prove valuable for executives and human resource professionals in large corporations seeking to enhance their corporate culture and increase employee satisfaction. In addition, the proposed recommendations are relevant for business consultants and academic researchers focused on the interaction between corporate and individual values within organizations.

LITERATURE REVIEW

Corporate culture is an integral part of any modern organization. M. Armstrong describes corporate culture as a set of shared beliefs, values, behavioral norms, and attitudes held by all employees within an organization (Armstrong, 1998). According to S. Robbins and P. Stephen, corporate culture plays a crucial role in shaping a company’s image and highlighting its unique characteristics (Robbins, 1994). G. Hofstede and M. Minkov in their book “Cultures and Organizations: Software of the Mind” (2005) identified six key dimensions for evaluating the corporate cultures of countries and organizations: power distance (1), uncertainty avoidance (2), individualism/collectivism (3), masculinity/femininity (4), long-term orientation (5), indulgence/restraint (6). In Russian organizations, the main cultural dimensions tend to be high power distance, individualism, and uncertainty avoidance (Tsoi & Kochetkova, 2023). F. Trompenaars’ classification of corporate culture is also one of the most well-known and widely accepted tools for analyzing and understanding various aspects of organizational culture (Table 1).

TABLE 1. Trompenaars’ classification of corporate culture

Comparable parameters	Egalitarianism (equality)	Hierarchy
Person	Incubator – Achievement-oriented culture	Family-Power-oriented culture
Goal	Guided missile – Task-oriented culture	Eiffel Tower-Role-oriented culture

Source: Compiled by the authors based on (Persikova, 2020).

Cameron & Quinn identify the following types of corporate culture: clan (family) culture, adhocracy culture, market (entrepreneurial) culture, and hierarchical (bureaucratic) culture (Ulbasheva & Shakova, 2016). Using Cameron and Quinn’s Competing Values Culture Model, it is possible to determine an organization’s cultural type and categorize it into one of these four groups. This enables the analysis of organizational issues and provides insights into why certain goals may not be achieved (The World of Work Project, n.d.).

Overall, the value of organizational culture lies in its ability to enhance internal cohesion and foster consistency in employee behavior (Togaibayeva et al., 2023). From the employee’s perspective, organizational culture serves as a kind of compass, guiding them toward the appropriate behaviors required for success within the organization (Laukart-Gorbacheva et al., 2021).

Values serve as guiding principles that people strive toward and hold in high regard. Although values are largely intangible and spiritual, they are ultimately expressed through specific

actions (Khasyanova, 2013). Individual employee values are a set of personal traits and characteristics that shape their capacity for such types of activity. Understanding these individual values allows an organization to influence the development of its corporate culture (Hofstede & Minkov, 2005). In recent years, the H2H (human-to-human) theory has gained popularity. This theory emphasizes that the relationship between managers who serve as key representatives of an organization's values and employees should be built on openness, friendliness, and emotional intelligence (Yusupova, 2022).

Let us consider Milton Rokeach's approach to the classification of values-based orientations, which is based on direct ranking (Rokich, 1973):

- 1) Terminal values represent the understanding that any ultimate personal goal is worth striving for;
- 2) Instrumental values reflect the belief that a certain set of means or modes of behavior is essential in any given situation.

Individual values benefit organizations as they help identify employees' priorities and goals and contribute to developing a corporate culture that considers these values.

METHODS

The research methods used in this study included a review of scientific literature and internal documents of Alfa-Bank, as well as employee surveys and in-depth interviews. Alfa-Bank's corporate culture was analyzed using a survey that included questions aimed at assessing employee loyalty, satisfaction, engagement, and conflict levels. Employee loyalty was measured based on the likelihood of recommending the company to a potential employee. The survey explored the reasons why employees would recommend the company. 104 employees from various departments participated, with the respondent pool comprising 40% managers and 60% specialists and interns.

The analysis of individual employee values at Alfa-Bank was based on M. Rokeach's methodology. Employees were asked to rank the importance of terminal and instrumental values in their lives. To accommodate the survey format, the list was shortened to nine values of each type. In addition, the type of organizational culture at Alfa-Bank was determined using the culture typology developed by Cameron & Quinn.

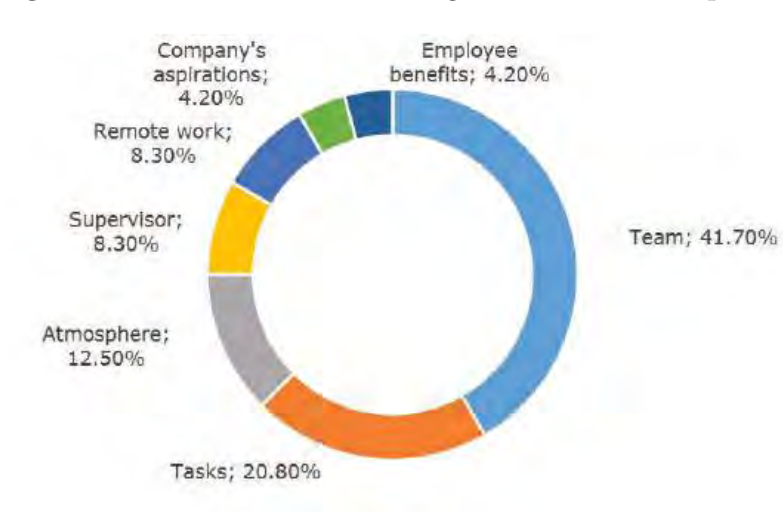
The information base for this research includes Alfa-Bank's official reports, original data collected through surveys and interviews, academic articles, and books dedicated to corporate culture and individual employee values.

RESULTS

Alfa-Bank is the largest private bank in Russia. It operates over 300 Phygital offices — next-generation bank branches that combine digital and physical formats of customer interaction (Alfa-Bank, 2023). The mission and vision of Alfa-Bank are articulated as follows: "We help people and businesses improve their lives by providing simple and convenient solutions, from everyday tasks to the most important matters. Today and for years to come" (Alfa-Bank, n.d.). The bank's mission and values are closely aligned with the worldview of its shareholders and employees.

Within the framework of this study, Alfa-Bank’s corporate culture was analyzed through employee surveys. The survey examined the reasons why employees would recommend the company. The most commonly cited factors were the team and the tasks. This indicates a positive work environment within the bank, which was also frequently mentioned as a reason for recommending Alfa-Bank as a place to work (Figure 1).

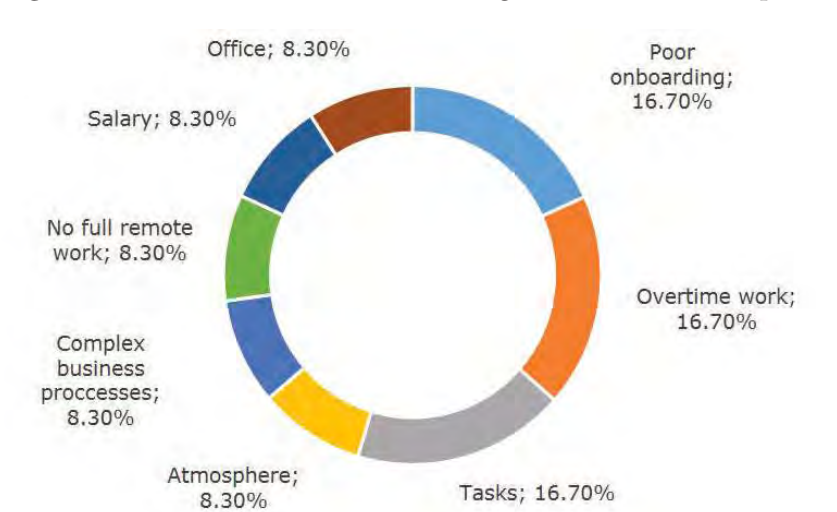
Figure 1. Reasons for recommending Alfa-Bank as an employer



Source: compiled by the authors.

Among the reasons that may hinder employee recommendations are poor onboarding, over-time work, task-related challenges, and workplace atmosphere. These negative job characteristics were identified by only some survey participants (25%). This indicates that some employees are fully satisfied with the work process (Figure 2).

Figure 2. Reasons for not recommending Alfa-Bank as an employer

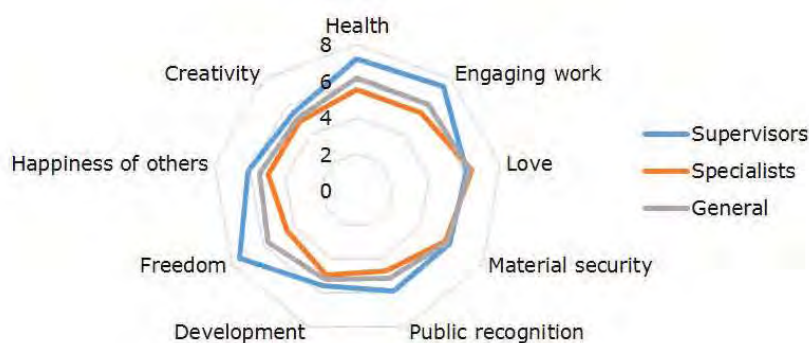


Source: compiled by the authors.

The job satisfaction score among managers was 3.36, while specialists rated their satisfaction at 2.98. For specialists, the most significant factors contributing to satisfaction were competent leadership, workplace relationships, and pride in their work. The engagement level among managers was assessed at 4.53, compared to 4.04 for specialists. Managers demonstrated the highest willingness to support their colleagues.

Individual employee values in Alfa-Bank were analyzed using Rokeach's methodology. Participants were asked to rate the importance of achieving terminal and instrumental values in their lives. To facilitate the survey, the list was reduced to nine values of each type. The results indicate that the most important values for managers are creativity, personal growth, social recognition, and financial security (Figure 3).

Figure 3. Terminal values of Alfa-Bank employees



Source: Compiled by the authors

For managerial staff, more specific values aimed at professional self-fulfillment are typical. In contrast, specialists tend to prioritize values such as freedom, public recognition, creativity, and engaging work. This category of employees is more inclined toward abstract values oriented towards personal life.

Instrumental values, which define preferred behavior models, were also analyzed as part of the study (Figure 4).

Figure 4. Instrumental values of Alfa-Bank employees



Source: Compiled by the authors

The most important values for managers were education, cheerfulness, diligence, and responsibility. This indicates a strong emphasis on communication and ethical behavior. For specialists, the highest values were honesty, diligence, independence, and tolerance. In this case, employees value not only interpersonal communication but also self-assertion.

While the values of managers and specialists are largely similar, there are certain differences. For example, in terms of terminal values, managers tend to prioritize personal development, whereas specialists place greater importance on freedom and engaging work. While development and interesting work can positively influence organizational performance, the value of freedom prioritized by specialists may lead to conflict.

Interviews with corporate employees revealed the influence of formal leaders on corporate culture within departments. The respondents generally agreed that managers create a team atmosphere focused on achieving results. They also claimed that leaders show loyalty toward employees who are forced to take time off and emphasize clarity, precision, and a fact-based approach when reviewing their performance.

The analysis of the conflict environment revealed a low degree of value-related contradictions among the personnel. Employees state that conflicts within the organization are rare, and effective conflict resolution mechanisms are in place. Conflict resolution is typically achieved either through independent discussions among the parties involved or with the assistance of a supervisor. In most cases, those involved in conflicts strive to reach a compromise rather than prove themselves right.

According to the classification of organizational cultures developed by Cameron & Quinn, the type of corporate culture at Alfa-Bank was identified. The results of the assessment indicate relatively balanced scores across all culture types (clan – 2.5, adhocracy – 2.67, market – 2.5, hierarchy – 2.33). Despite formal processes within the organization, the dominant culture type was identified as adhocratic. This suggests that Alfa-Bank is a flexible organization focused on external market positioning and achieving results.

Thus, it can be concluded that there is a partial synergy between the values of Alfa-Bank and those of its employees. This is reflected in the shared commitment to meeting customer needs, caring for employees, and incorporating creative approaches into work processes. The desire for independence in decision-making is more common among junior specialists with less professional experience. Such values may foster the discovery of new ways of conducting business and promote individual responsibility for one's contributions to the team and management.

CONCLUSIONS

Based on the research conducted, specific recommendations were developed for establishing and enhancing the corporate culture of large companies. These recommendations cover seven key areas.

The first area concerns the development of a strategy for forming corporate culture. It is essential to implement updated corporate values in a top-down manner, starting with the CEO and senior management, while also considering individual employee values. This approach can help increase staff loyalty, job satisfaction, and engagement.

The second important aspect addresses the issue of overtime. It is necessary to create an online reporting system that allows employees to request staff expansion or compensation for overtime work. In addition, guidelines should be developed for submitting staffing requests, and a user-friendly system for filing overtime payment applications should be introduced through corporate digital platforms.

The third area refers to the improvement of the onboarding process. It is recommended to organize introductory meetings between new employees and team leaders, establish a centralized information base on colleagues within the department and adjacent units, and train mentors with clearly defined roles in guiding interns. A key element is the arrangement of regular meetings between mentors and newcomers to review progress and plan further development.

The fourth area involves organizing internal events to support the implementation of changes. An effective solution would be to hold conferences with the participation of psychologists and HR specialists to present new procedures related to overtime and staffing changes. Meetings with mentors/leaders are also useful for aligning tasks regarding new employee adaptation. Broad communication with staff can be achieved through email newsletters and posts in corporate blogs.

The development of corporate culture through informal activities represents the fifth area. It is advisable to organize meetups that encourage knowledge sharing, hold regular brainstorming sessions for idea generation and innovation, and implement business training programs that foster employees' creative thinking.

The sixth area is related to student upskilling programs. It is proposed to develop joint educational initiatives (for example, in collaboration with the Financial University under the Government of the Russian Federation in project management), as well as to organize courses, after which the most successful students would be offered internships at Alfa-Bank.

Finally, the seventh area focuses on strengthening corporate culture through a values-based system. Special attention should be given to values such as caring for others, tolerance, and the pursuit of creativity and personal growth. Supporting these values through targeted events and programs contributes to employees' professional development but also their deeper engagement in the corporate environment.

The comprehensive implementation of these recommendations will contribute not only to the development of a resilient corporate culture but also to increased employee satisfaction and enhanced economic efficiency for the company.

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El sistema de aplicación de la ley como fenómeno social: estructura y perspectivas de desarrollo

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Resumen. El objetivo del estudio es evaluar los enfoques científicos para la interpretación del sistema de aplicación de la ley como fenómeno social, delinear su estructura y determinar las perspectivas de desarrollo. Los métodos de investigación incluyen análisis y síntesis, inducción y deducción, generalización, análisis sistemático y explicación, que es la base para un estudio exhaustivo de los temas discutidos. La hipótesis supone que el sistema de aplicación de la ley en Ucrania es un fenómeno social estructurado, cada componente del cual desempeña un papel funcional en la protección de los derechos, libertades y bienes públicos individuales. La conclusión señala que la estructura de los organismos encargados de hacer cumplir la ley, aunque compleja, es comprensible en el contexto social. Su principal finalidad social se implementa a través de procedimientos de protección que proporcionan una transición lógica de las relaciones jurídicas protectoras a las acciones ejecutivas directas. Estas funciones, realizadas por un grupo definido de personas, son jurídicamente significativas y actúan como el eslabón final de la cadena de «establecimiento, prestación, implementación y protección». Además, son socialmente necesarios, aseguran el mantenimiento

del orden público. El estudio enfatiza que la construcción de un verdadero Estado de derecho requiere optimización y mejoras estructurales a largo plazo.

Palabras clave: justicia social, sistema de aplicación de la ley, principios, organismos encargados de hacer cumplir la ley, tribunales, relaciones policiales, derecho, función policial, fenómeno social.

Law enforcement system as a social phenomenon: structure and prospects of development

Abstract. The study aims to assess scientific approaches to interpreting the law enforcement system as a social phenomenon, outline its structure, and identify future development prospects. The research methods include analysis and synthesis, induction and deduction, generalization, systematic analysis, and explanation, providing a basis for a thorough examination of the issues discussed. The hypothesis suggests that the law enforcement system of Ukraine is a structured social phenomenon, with each component playing a functional role in protecting individual rights, freedoms, and public goods. The conclusion notes that the law enforcement structure, though complex, is understandable within a social context. Its primary social purpose is realized through protection procedures, enabling a logical transition from protective legal relations to direct enforcement actions. These functions, carried out by a defined group of individuals, are legally significant, serving as the final link in the chain of «establishment, provision, implementation, and protection.» Furthermore, they are socially necessary, ensuring the maintenance of law and order. The study highlights that building a true legal state requires long-term optimization and structural improvements.

Keywords: social justice, law enforcement system, principles, law enforcement agencies, court, law enforcement relations, law, law enforcement function, social phenomenon.

INTRODUCTION

The issue of the state, its concept, essence and role in society belongs to the circle of the most relevant and debatable in modern legal science. This is due to a number of reasons, among which the following can be singled out: 1) they directly affect the interests of various layers of society, political parties and movements; 2) no other organization can compete with the state in the variety of assigned tasks and functions, in influencing the fate of society; 3) the state is a complex and internally contradictory socio-political phenomenon (Byelov, 2020). Thus, as a form of organization of society, the state is designed to ensure its integrity and control, to perform functions determined by the needs of society, and therefore to serve its interests (Byelov, Shved & Byelova, 2023).

The state establishes legal boundaries within which the law enforcement network and its bodies operate, including legislative acts governing this operation, powers, duties and procedures. In addition, the state is responsible for creating and maintaining the institutional scheme of the law enforcement system, which includes the police, prosecutor's office, courts, investigative services and other bodies. It provides funding, training, logistics and other resources necessary for the effective

operation of these bodies. The state is also responsible for the formation and implementation of policy in the law enforcement area, including the development of strategies to fight crime, prevent offenses, and defend individuals' rights and freedoms. An important aspect of the state's role is also providing transparency and accountability of law enforcement agencies, monitoring their functioning, which guarantees compliance with the law and protection of human rights. Therefore, the state plays a key role in the formation of an effective, fair and democratic law enforcement system that meets the needs of society and ensures the maintenance of law and order and security in the country.

Therefore, we suggest that the law enforcement system of Ukraine is a social phenomenon that reflects the current state of the formed relationships between the state and society in the context of the existing public demand for a safe social environment and balancing the balance of social justice.

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

In the modern world, there is a significant number of texts, monographs, articles, etc., dedicated to systems and systems theory. For example, in philosophy it is noted that a system should be considered a whole complex formation, the internal relations between the components of which are much more intense than between these elements and the environment (Petrushenko, 2011; Yednak, 2020). The sociological theory of systems uses the term "social system". At the same time, the theory of law uses concepts such as "legal system" and "system of law", which are basic concepts in jurisprudence. Therefore, from the point of view of specialists in the theory of law, the term "system" must be seen as a certain integral phenomenon consisting of interconnected and interacting component. As V. Yednak notes, when clarifying the essence of the system of state bodies, it should be borne in mind that the structural components of such a system will be such bodies, and the peculiarities of their hierarchical structure should be considered as a connection of the components of such a system (Yednak, 2020).

Scientists such as V. Hrytsenko, K. Malyshev, O. Markeeva, and others use the first attitude when formulating the concept of law enforcement structure. For example, V. Hrytsenko notes that the law enforcement system of Ukraine is an structured network of state and non-state agencies, specialized state institutions, means, methods and guarantees aimed at protecting social relations, individuals' rights, liberties and concerns from illegal actions (Hrytsenko, 2015). Instead, K. Malyshev proposed a more detailed definition, focusing on the system of State authorities whose activities are related to realizing law enforcement function. Thus, the scholar conventionally divided the totality of the specified bodies into several subsystems, namely: the managing (regulation, development of state-management decisions and other measures regarding the State administration of law enforcement activities) and managed (specially authorized State management actors performing law enforcement activities through the application preventive, coercive, legal, force and other measures of influence on social relations, which are governed by relevant rules), the functioning of which is connected with implementing state security, public order protection, prevention and counteraction of crime as the basis of protection of public, public and private interests legalized in the legal system (Malyshev, 2020). The representatives of the second approach are, for example, A. Bilas, T. Pikulya, and A. Kulish. The latter claims that the law enforcement system is a comprehensive social system characterized by integrity, interdependence of the system and the environment, hierarchy, and emergency. The author formulated the term of the law enforcement system as a multi-layered social system, consisted of legal tools, technics and guarantees that ensure the defense of social relations from illegal encroachments, and State agencies implementing law enforcement functions (Kulish, 2009).

Other components are cited by A. Bilas and T. Pikul. Thus, A. Bilas claims that the law enforcement system contains six aspects: law enforcement objective, actors, objects, protective legal rules, operation, and relations (Bilas, 2016). In turn, T. Pikulya notes that law enforcement activities are performed by law enforcement actors within security legal relations grounded on law enforcement system principles, in particular: legality; everything that is not allowed is forbidden; the inevitability of punishment; reconciliation of private and public interests; democracy; systematicity; multiple options for solving problems of legal protection of social relations; respect for human dignity, rights, liberties and interests (Pikulia, 2004).

Some authors reveal the legal system through objects of influence/defense. For example, A. Movchan believes that the concept of “human rights protection system” is the most crucial element of the notion of “law enforcement system”, where the object of protection is not only human rights, but also the law itself, as well as other components of the legal scheme, but always human rights remain one of the main objects of protection (Dudchenko, 2019). According to V. Hrytsenko, the protection of human rights is a task, not a characteristic feature of the legal system. Among these, the author includes: 1) protection of the constitutional order, sovereignty and territorial integrity of the state; 2) defense of rights, liberties and interests of individuals, legal entities, society and the state in general; 3) combating crime; 4) purposeful improvement of the law enforcement system. This enabled to divide the law enforcement system of Ukraine roles into: a) crucial ones: protective (law enforcement); operative and investigative; prophylactic; investigation of crimes; executive; administrative; b) auxiliary: organizational and managerial; coordination; control; informational and analytical (Hrytsenko, 2015). Consequently, the aim of the law enforcement system is to provide the maximum possible level of law and order in society. In this context, the scholar stresses that common principles of the law enforcement system are: 1) the principle of social justice; 2) the principle of democracy; 3) the principle of humanism and equality; 4) the principle of the rule of law; 5) the principle of legality. Specific concepts of the law enforcement structure include the following: 1) the principle of publicity; 2) the principle of interaction with state authorities; 3) normativity; 4) obligation; 5) complexity (Hrytsenko, 2015).

The analysis of the given opinions indicates the diversity of methods to defining the law enforcement system, which indicates its complexity and multifacetedness, in particular from a social point of view. Researchers such as V. Hrytsenko, K. Malyshev and others believe that the law enforcement system as a set of agencies protecting social relations providing the defense of the citizens’ rights and freedoms. At the same time, the authors, in particular A. Kulish and T. Pikulya, emphasize the systemic character and interrelatedness of the law enforcement system components, stressing the relevance of legal rules, institutions and functions that ensure its functioning. Another important aspect is that scholars pay attention to different elements of the law enforcement system. This actualizes the expediency of conducting a systematic analysis of scientific views on the nature of the law enforcement system as a social phenomenon that will allow not only to better understand its structure, but also to identify key problems and prospects for development.

MATERIALS AND METHODS

In order to ensure obtaining relevant and reliable data during the conduct of this research, a combination of various scientific methods is necessary, which will contribute to the disclosure of the raised issues comprehensively and comprehensively. First, the method of analysis and synthe-

sis will allow considering the components of the law enforcement system both separately and in their interaction, which will contribute to a deeper understanding of its social nature, structure and principles of functioning. Secondly, the method of induction and deduction should ensure the formation of theoretical generalizations on the basis of conducted scientific investigations, which will allow to move from the study of specific facts to general conclusions and vice versa. The combination of these two methods implies a multi-level research, because it organically highlights the aspects of the specific, which turns into the general and the general, which becomes specific. Thirdly, the method of generalization will contribute to the formulation of conclusions confirmed by empirical data and analysis of scientific sources, because it ensures the systematization and integration of information collected during the research, which, in turn, will allow the formation of well-founded conclusions. Fourthly, the system analysis method will form a comprehensive view of the law enforcement system operation as a social phenomenon in general, which allows to assess its complexity and relationships with other components of the legal system. Fifth, the method of explanation will provide an opportunity to reveal the essence of the studied phenomena in detail, which is critically important for a deeper understanding of the complex aspects of the law enforcement system. Sixth, the formal-legal method and the method of legal rules explanation will be useful in the analysis of legislative doctrine, as they allow a detailed study of the structure and essence of legal rules, and application in real conditions. Seventh, the axiomatic method will allow not to reveal the self-evident processes and principles that form the basis of law enforcement system operation.

Accordingly, both quantitative and qualitative approaches should be applicable in order to cover the multifaceted nature of the studied phenomena. The legislative doctrine of Ukraine, scientific publications revealing the foundations and concepts of law enforcement system operation, as well as analytical data explaining individual processes in the context of law enforcement agencies activities and the course of social processes within its limits should serve as materials for analysis.

RESEARCH RESULTS

It should be agreed that the law enforcement system by its characteristics is a mechanical scheme, but, serving as a component of the state-legal system, it is part of an organic network. Considering this, evolution of the law enforcement system takes on a contradictory nature, and its behavior in the conditions of reform is difficult to predict. For the same reason, the consequences of restructuring the law enforcement system for operating and development of the state legal system in general and its individual elements organically related to law enforcement are not always predictable (Kovaliv, Yesimov & Lozynskyi, 2018).

We assume that its crucial structural components are: 1) law enforcement bodies; 2) law enforcement operation; 3) law enforcement role; 4) law enforcement affairs.

Considering this, we can say that law enforcement bodies are one of the key aspects of the law enforcement network. However, regarding their definition and the state structures that belong to them, there is currently no unequivocal answer.

Based on the analysis of monographic studies, it is possible to single out the main features describing law enforcement bodies, namely:

- jurisdictional - the ability to resolve disputes out of court, for example, to bring to administrative responsibility. Yes, according to Article 255 of the Code of Ukraine on Administrative Offenses, the State Bureau of Investigation has the right to draw up protocols for the commission of administrative offenses provided for in Article 184-3 (in terms of illegal use of the name and signs of belonging to the State Bureau of Investigation) and Article 185-13 (in terms of failure to comply with legal requirements of officials of the State Bureau of Investigation);
- functional - includes a wide range of tasks (from protecting law and order to defending the citizens' rights and state security. So, for example, the functions of the prosecutor's office include monitoring the development of laws, supporting the state's prosecution in court, judicial representation; State Bureau of Investigation - prevention, detection, cessation, revealing and investigation of crimes that fall within its competence; judicial authorities - judicial protection of breached and contested rights of individuals in the way of administration of justice;
- institutional independence means personal autonomy, which is ensured by the power through a system of guarantees of non-interference in its activities. The Law of Ukraine "On the State Bureau of Investigation" under Article 4 securing guarantees of the independence of this body, establishing that: "the illegal transfer of state bodies, local self-government bodies, their local and service individuals, political parties, and public bodies is protected data on other physical or legal characteristics of the activities of the State Investigation Bureau" (Verkhovna Rada of Ukraine, 2015). A similar norm has also been established for the activities of judicial authorities. In particular, Article 6 of the Law of Ukraine "On the Judiciary and the Status of Judges" prohibits interfering with the justice administration, influencing the court or judges in any way, disrespecting the court or judges, collecting, storing, using and disseminating information in any form with the aim of causing harming the authority of judges or affecting the impartiality of the court (Verkhovna Rada of Ukraine, 2016).

We are impressed by the idea that law enforcement agencies are jurisdictional bodies, which, according to the current legislation, are authorized to provide law and order, defend the rights and liberties of people and citizens, to prevent and stop crimes, as well as to apply state coercion to the perpetrators, and the system of law enforcement agencies is a set of specialized State bodies, united by functional criteria, which in cooperation carry out the protection and defense of main individuals' rights, freedoms and interests, combating crime and other offenses (Yusupov, 2015).

Thus, the legal discourse determines that law enforcement bodies as a component of the law enforcement system, on the one hand, are endowed with autonomy, which is guaranteed by the state by establishing a ban on interference in their functioning, and on the other one, law enforcement bodies are functionally united, because they all perform law enforcement tasks, interacting both among themselves and with other institutions. From a social standpoint, they represent the institutional structures, which appeals to or respond to the facts of deviations in the course of social processes are a guarantee of the practical effectiveness of the established standards for ensuring law and order.

IN. Makarchuk stresses that law enforcement bodies should have the inherent ability to effectively influence various aspects of the country's security from the standpoint of functional unity, which will allow them to strategically and functionally solve issues of national security and defense of Ukraine (Makarchuk, 2023). However, there is also another position, according to which law enforcement bodies can be not only state, but also non-state agencies.

In particular, according to the authors of the textbook “Jurisprudence”, law enforcement operation is activity by competent actors of state and non-state organizations and their officials in the consideration of legal cases, protection and defense of social relations from offenses and adoption of special acts of implementation of material legal norms in order to ensure legality and protection of law and order (Kopyeychikov, 2003).

An example of this is the activity of private detective agencies that work successfully in many democratic countries. In Ukraine, a discussion regarding the legalization of such activities has been going on for a long time. Thus, in 2020, draft law No. 3562-IX “On private detective activity” was adopted. In it, the authors proposed to establish that private detective activity is aimed at defending individuals’ and legal entities’ rights and interests by providing private detective services (Verkhovna Rada of Ukraine, 2020). It is also necessary to emphasize that non-state actors of law enforcement activities can be included in the law enforcement system of the state, but cannot belong to the system of law enforcement bodies, since they do not have a jurisdictional sign and institutional independence.

Therefore, as A. Tyurina rightly pointed out, the system-forming factor in this case is law enforcement operation, for which the State creates law enforcement agencies (Tyurina, 2006). Consequently, the next component that needs consideration is law enforcement.

A fairly common term of law enforcement operation is as follows: it is a state activity performed for defending law by empowered agencies through specific tools of influence according to law and in compliance with the established procedures (Bandurka, 1999). The central categories that reflect its essence are: the object of protection and the actor of law enforcement activity. Thus, the object of protection is social relations, which are regulated by law and which can potentially or actually be harmed. Instead, law enforcement activities actor is illegal acts (misdemeanors and crimes), and also indirectly there may be other legal and social phenomena that determine them or connected with them (for example, identifying the causes of offenses or prevention of offenses) (Tyurina, 2006).

Law enforcement activities are mainly implemented in different types of law enforcement actions, namely law-establishing, law-enforcing, law-compulsory and law-restoring. Structurally, the system of law enforcement activities covers: 1) operation of state bodies for organizational support of the activities of judicial authorities; 2) activities of the prosecutor’s office in the performance of the tasks assigned to them (maintenance of the State prosecution in court, the function of representation and supervisory functions); 3) activities to detect, prevent and investigate criminal offenses; 4) actions for protecting State security, the State border, law and order (National Academy of Internal Affairs, 2024).

Thus, law enforcement activity as a multi-component operation is directed by various state means of a political and administrative nature with the aim of preventing and countering the commission of offenses consisting of the object and subject of this activity. Its social context presupposes the existence of a system of such means, which are perceived by society either as a measure of necessary intervention in the private life of a person to secure collective security (protecting public good), or as a set of repressive measures (mostly precisely such), the need for which is significantly exaggerated. We believe that this component of the law enforcement system demonstrates the necessity to ensure a proper balance between the effectiveness of law enforcement and the observance of human rights in its incorporation.

To highlight the subject of the research, it is necessary to find out which law enforcement structures are directly related to the provision of adequate functioning of the law enforcement system. As V. Makarchuk rightly pointed out, there are State agencies that do not belong to law enforcement, but are endowed with law enforcement functions and directly influence establishing and incorporating of State policy in the sphere of providing national security and defense of our country (Makarchuk, 2023). Therefore, in order to answer the question which State bodies belong to law enforcement, perform law enforcement tasks, and, consequently, belong to the law enforcement network, let's examine the next component - the law enforcement function.

The law enforcement function is the leading one in the system of internal functions of the State and provides guaranteed defense of the citizens' rights and freedoms through the establishment of an effective legal order, ensuring legality, protection of sovereignty, territorial integrity, national security and the State border (Kolomiets, 2017). According to S. Ostrovskii, it is a purposeful activity of the State, performed by the empowered agencies using legal tools of influence to solve law enforcement concerns (Ostrovskii, 2017). O. Bezpaloa notes that the specified function is the direction of the state's activity, which is implemented by the system of state authorities authorized to do so (mainly law enforcement agencies), local self-government, and the public, authorized exclusively within powers granted by law to implement legal measures of influence (including coercive measures) to provide legality and law and order (Bezpalova, 2014).

Thus, the given definitions enable to summarize that the law enforcement function as a key area of law enforcement agencies operation has certain features. In our opinion, the most relevant are those formulated by V. Skindyuk. It is about the fact that it: 1) is the direction of state policy, which is manifested in the state's activities; 2) designed to defending individuals' and legal entities' rights and freedoms, the security of society and, accordingly, the security of the State, the purpose of which is to establish and ensure law and order; 3) incorporation actors are specially authorized state authorities; 4) implemented using the forms and methods defined by administrative and legal regulations; 5) includes the possibility of using means of coercion in the procedural forms enshrined in the law in the presence of grounds enshrined by it (Shkindyuk, 2021).

In common, law enforcement function as a component of the law enforcement structure is a complete network of legal and administrative measures aimed at ensuring law and order and defending the citizens' and society interests, the provision of which is the prerogative of law enforcement bodies. Its influence on social relations and citizens' expectations of the quality of implementation of the system of such measures are factors in the formation of the social vision of justice, legality and the level of "guardianship" of the state in matters of its internal security.

The last component of the law enforcement system that requires analysis in the context of the issues of this study, is law enforcement legal relations.

It is worth noting that some domestic scientists distinguish between such concepts as "protective legal relations" and "defense legal relations". For example, G. Nakonechna, researching protective administrative-legal relations involving courts, comes to the conclusion that such relations arise in proceedings to bring judges to disciplinary responsibility (Nakonechna, 2014). However, in our opinion, the specified legal relationship can also be characterized as protective, since the prosecution of unscrupulous judges is not only a protective function, but also an important component of defending citizen's rights and freedoms in the event that the judge's actions have caused negative consequences for an individual. In addition, the judge himself can be a participant in protective

and defense legal relations, albeit procedural ones. In this context, the investigation of phenomena is self-sufficient, because they perform different tasks. However, scientists to a greater extent justify the absorption of one category of features by another, thus forming one category of compatible content. We are supporters of the opinion that theoretically the differentiation of law enforcement and human rights protection legal relations is rational, but in practical discourse it is not functional enough, and therefore we join the position of those scientists who consider security as a phenomenon that absorbs protection. More specifically, it refers to the fact that protection is carried out constantly, and protection becomes necessary under exceptional conditions.

Therefore, in our opinion, the nature of law enforcement relations should not be limited exclusively to functional meaning. For example, there is a view that they are a legal form of social interaction between legal and capable subjects, which has an authoritative nature, is determined by the fact of committing an offense and aims to restore the violated right, bring the offender to a certain type of legal responsibility and enables enforcement it is a subjective legal obligation enshrined in law or contract and mediated by a law enforcement act (Serdiuk, 2008). The peculiarity of the direction of law enforcement activities is that most legal relations in this area are implemented on the basis of legal norms that prohibit the commission of illegal actions (norms of a special part of the Criminal Code of Ukraine, legal norms that determine the composition of administrative offenses, disciplinary offenses) (Korneliuk, 2020).

Consequently, law enforcement legal relations have the following characteristics: 1) they arise on the basis of legal norms; 2) they are related to the violation of legal prescriptions, that is, offenses; 3) they are formed between individual natural persons (citizens, foreigners, stateless persons) and legal entities, on the one hand, and of the law enforcement operation actors, on the other (Korneliuk, 2020); 4) they are volitional relations, as they arise on the basis of state coercion and are applied on behalf of the state.

In view of the above, it is worth emphasizing several important theses regarding the character of law enforcement relations. First, the concept of “legal protection” is covered by the concept of “legal defense” (Legenchenko, 2014); secondly, they should not be limited solely to the fact of committing an offense, because they also include preventive measures and may arise due to the need to counteract potential threats of committing offenses; thirdly, the above-defined characteristics of law enforcement legal relations need to be clarified.

In contrast the nature of law enforcement relations, the social aspect, in our opinion, is quite clear. In particular, as a form of regulation of social relations, law enforcement relations have a clear ideological and substantive structure, which is manifested by the community’s awareness of the need for their emergence and development.

CONCLUSIONS

It is worth noting that the conducted research revealed the lack of due attention by scientists to the social context of the law enforcement system of Ukraine, because their main scientific interest is focused on the identification of its legal nature.

In general, the law enforcement system as an object of scientific research in a social context is characterized by complexity, but at the same time it is quite understandable. Its main social purpose is objectified through procedures for the protection of both a certain range of values and public

goods in general. The leading feature of the law enforcement system is the possibility of a logical and smooth transition of protective legal relations directly into protective ones, which provide an opportunity for a normatively defined circle of persons to implement a law enforcement function, which is not only legally significant, because it serves as a closing link in the chain “establishment - provision - implementation - protection”. but also socially necessary, as it guarantees the maintenance of law and order.

The study of the law enforcement system elements indicates its static structure, which reflects a certain orderliness. However, the dynamic context of this issue consists in the constant change of the legislative provision of its functionality, which, in turn, indicates its flexibility in the conditions of rapid social changes.

It is worth noting that reformation of the law enforcement system of Ukraine is still relevant, because the development of a truly legal social state involves a number of optimization changes of a long-term nature. Under modern conditions, the range of law enforcement agencies powers has significantly expanded, which is due to security factors, but it is extremely important to ensure a balance between the measures of “necessity” and “necessary” restrictions in the future.

Accordingly, the creation of an adaptive, effective and operational law enforcement system that will meet the modern challenges and needs of society is an issue of the present that has a long-term perspective of development.

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ARTÍCULO DE INVESTIGACIÓN

La alienación del trabajo en la era digital

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Resumen: Basándose en la metodología marxista, este artículo dilucida el concepto de alienación del trabajo e identifica sus nuevas manifestaciones en la era digital: la alienación del trabajo expresada a través de la alienación de la ciencia y la tecnología; la degradación del trabajo a actividades «inútiles», convirtiendo a los humanos en seres «sin sentido»; y la transformación de los trabajadores en entidades privadas de libertad. Junto a la alienación del trabajo están las agudas contradicciones entre capital y trabajo, que presagian nuevas crisis sociales en el futuro. Además de la base teórica marxista, el estudio emplea el método de análisis documental para recopilar y examinar trabajos académicos, informes internacionales e investigaciones empíricas sobre la alienación laboral en la era digital. Este enfoque metodológico sirve como base sólida para proponer varias soluciones para mitigar la alienación laboral en la actual era digital, incluyendo la gestión de la propiedad de los medios de producción digitales -más críticamente, el control de la propiedad de los big data-; el fomento del desarrollo de la tecnología en una dirección democrática y civilizada; y el avance del desarrollo humano integral.

Palabras clave: alienación laboral, era digital, contradicciones en la era digital, trabajo en la era digital.

The alienation of labor in the digital era

Abstract: Based on the Marxist methodology, this article elucidates the concept of labor alienation and identifies its new manifestations in the digital era: alienation of labor as expressed through the alienation of science and technology; the downgrading of labor into “useless” activities, rendering humans into “meaningless” beings; and the transformation of workers into entities deprived of freedom. Alongside labor alienation are the sharp contradictions between capital and labor, foreshadowing new societal crises in the future. In addition to the Marxist theoretical foundation, the study employs the documentary analysis method to collect and examine academic works, international reports, and empirical research on labor alienation in the digital age. This methodological approach serves as a solid basis for proposing several solutions to mitigate labor alienation in the current digital era, including managing the ownership of digital means of production—most critically, controlling the ownership of big data; fostering the development of technology in a democratic and civilized direction; and advancing comprehensive human development.

Keywords: labor alienation, digital era, contradictions in the digital age, labor in the digital era.

INTRODUCTION

The digital industrial revolution is profoundly impacting all aspects of societal life today. It is constantly and rapidly reshaping humanity’s way of existence. While the issue of labor alienation has existed in previous eras, it manifests more acutely in the digital era. For instance, with the explosive growth of big data and artificial intelligence (AI), humans are increasingly replaced not only in manual labor but also in intellectual work. Widespread unemployment is expected to pose significant challenges to nations worldwide. Moreover, the accumulation and concentration of the most critical means of production today—big data—into the hands of a few large capitalist corporations will exacerbate imbalances in production. Quantitative algorithms capable of analyzing the inner world of workers (emotions, thoughts, perspectives, etc.) are emerging, leading to new manifestations of labor alienation. Workers are not only alienated into a state of uselessness but also into states of unfreedom and meaninglessness. This article employs the methodology of historical materialism to view the development of the digital era as a necessary outcome of the advancement of industrial production forces. From this perspective, the article proposes solutions to mitigate labor alienation in the digital age. The study focuses on analyzing the globally pervasive nature of labor alienation within the context of the rapid advancement of digital technology and comprehensive digital transformation worldwide. The manifestations of labor alienation are explored primarily through the theoretical framework of Marxist philosophy and international academic works, aiming to highlight the universal impact of technology on labor, transcending national or regional boundaries. However, as a theoretical and solution-oriented study, the article does not delve into empirical verification through specific data or case studies. This limitation presents challenges in directly applying the proposed solutions in practice or evaluating their effectiveness. With a global orientation and long-term vision, this research aspires to provide a critical theoretical foundation for researchers, policymakers, and international organizations in addressing the labor challenges brought forth by the digital era.

LITERATURE REVIEW:

There have been numerous studies focusing on the aspect of labor alienation in the modern context. Some notable works include:

International Studies:

Christian Fuchs (2013), in his book “Digital Labour and Karl Marx”, analyzes how Marx’s theories on labor and alienation are applied to the digital economy. The study emphasizes that digital labor is not only exploited as physical labor but also commodified in the form of informational and knowledge value. This raises new issues regarding labor rights in online environments. He compares this to unpaid labor, viewing it as a modern form of alienation. Fuchs also underscores the importance of rethinking class struggle in the digital realm. Fuchs (2013) argues that:

Digital labor under capitalism mirrors traditional forms of labor exploitation, yet it extends beyond physical labor to the realm of knowledge and information. The commodification of digital labor transforms how value is created and extracted in the information age (p. 45).

Phoebe V. Moore (2018), in “The Quantified Self in Precarity: Work, Technology, and What Counts”, delves into the impact of quantification technologies on modern labor. The author argues that the monitoring and surveillance of workers’ emotions through technological devices lead to a loss of both physical and mental freedom, increasing stress and pressure in the workplace. Continuous tracking creates a sense of insecurity, as workers are constantly required to validate their performance through numerical metrics.

In another study, Moore explores labor alienation in the digital environment by applying Marxist concepts. The article focuses on how productivity monitoring platforms and micromanagement through technology lead to a sense of workers losing control over their jobs. Moore argues that the reliance on surveillance technologies exacerbates alienation, transforming humans into tools for the digital system rather than being its subjects. The author contends that measuring emotional labor is not aimed at compensating employees but at managing and predicting their potential breakdown or resistance:

New uses of technologies in the quantified workplace are part of an emerging form of updated Taylorism, that is, processes of subordination, where quantification of new areas of work through tracking technologies may help corporations keep up with cut-throat competition (Moore, 2018, p. 24).

This process, Moore suggests, can deepen alienation and increase corporate control over employees’ personal lives and emotions. Furthermore, the study warns of the development of modern Taylorism, where digitized technologies are reshaping labor relations and requiring employees to continually self-manage and adapt in order to survive in an increasingly dynamic work environment.

Research in Vietnam:

Nguyễn Thanh Huyền (2007), in her book “Karl Marx’s Concept of Alienation and Its Significance for the Development of the Vietnamese People Today”, provides a comprehensive overview of Marx’s theory of alienation and applies it to analyze the issues faced by Vietnamese people under the impacts of a market economy and globalization. This study proposes several solutions to eliminate alienation and foster comprehensive human development in Vietnam.

Research Gaps:

The aforementioned studies primarily focus on describing the manifestations of labor alienation in the digital era or predicting the losses that labor might face. However, they fail to adequately address: The new manifestations of labor alienation in the context of comprehensive digital transformation; The specific challenges faced by capitalism in addressing labor alienation during the digital era; The root causes and specific solutions to mitigate this issue in the future.

New Contributions of the Research:

The author's research not only inherits theoretical insights from previous studies but also focuses on: Generalizing the new manifestations of labor alienation in the digital era, such as alienation through science and technology, the loss of freedom in workers' consciousness, and the prediction of crises within capitalism; Identifying the root causes of alienation, stemming from the ownership of digital means of production and the division of labor in society, closely tied to the domination of large technological corporations; Proposing specific solutions to control data ownership, promote the development of humane science and technology, and foster comprehensive human development.

METHOD

This study employs dialectical materialism and historical materialism as its methodological framework: Dialectical materialism: It examines the contradictions between capital and labor as reflections of the conflict between the relations of production and the forces of production. The root cause of labor alienation is identified as the private ownership of the means of production. Historical materialism: This approach focuses on the material conditions of the digital production system, where labor alienation has intensified and reveals new manifestations, challenging the core values of human existence. Additionally, the study utilizes an interdisciplinary approach, integrating philosophy, data science, and economics to analyze the impacts of labor alienation on modern society.

The document analysis method was employed to collect and study academic works, international reports, and practical research related to labor alienation in the digital era. Notably, works such as "Digital Labour and Karl Marx" by Fuchs and "The Quantified Self in Precarity: Work, Technology and What Counts" by Phoebe V. Moore, along with other reputable studies, were thoroughly analyzed to establish the theoretical foundation for this article. Additionally, the deductive and synthesis methods were used to forecast future developmental trends and propose solutions to mitigate labor alienation in the digital era. This approach not only ensures objectivity and scientific rigor but also provides a comprehensive perspective.

RESULTS AND DISCUSSION

1. Marxist Theory of Labor Alienation

Alienation is a concept used to describe the transformation and change of an object in a way that contradicts its inherent nature. According to the Concise Dictionary of Philosophy (1987), alienation, in its objective form, manifests as resistance to the inhuman qualities of private property relations. Alienation has been explored in the philosophies of Hegel and Feuerbach: for Hegel, it is the alienation of the world spirit; for Feuerbach, it is the alienation of religion. Unlike his predeces-

sors, Karl Marx clarified the concept of alienation in labor and outlined a path for overcoming it. In Marx's view, labor is an activity performed by a living person, requiring the expenditure of physical energy to operate tools and the entire system of production. Labor is described as "living" because it is rooted in human life. When this energy is depleted, it must be regenerated. Marx defines labor power in Capital:

By labor power or capacity for labor is to be understood the aggregate of those mental and physical capabilities existing in a human being, which he exercises whenever he produces a use-value of any kind (Marx & Engels, 1994, p. 251).

In the context of capitalism, Marx's theory of labor alienation can be summarized as follows:

Alienation of Workers from the Product of Labor

In capitalism, labor power does not belong to the worker, and thus the results of labor do not belong to them either. The product of labor becomes an independent entity that dominates the worker:

The object produced by labor, its product, now stands opposed to it as an alien being, as a power independent of the producer (Marx & Engels, 2000a, p.128).

The more goods a worker produces, the cheaper their labor power becomes. As the value of the material world increases, the value of the human world diminishes. The worker, once the subject who creates the product, becomes subordinate to the product and must adhere to its inherent rules.

Alienation in the Act of Labor

In the capitalist mode of production, human labor power is reduced to the basic physical forces required to operate machinery. Under such conditions, the humanistic qualities of labor are degraded. Labor is reduced to "bare exertion," increasingly characterized by mechanical and simplistic tasks. This represents a dehumanization of labor, as the work performed no longer requires any special qualities. At this point, labor power is merely a combination of raw muscles, nerves, and a basic brain, used to perform repetitive tasks in assembly lines controlled by simple mechanisms.

Labor, as an activity, becomes an external burden, imprisoning the worker's body and mind. This results in a paradoxical reversal: workers feel free only when engaging in instinctual behaviors akin to those of animals, such as eating, drinking, procreating, dwelling, or moving. Conversely, in labor—the uniquely human activity—workers feel reduced to the state of animals. What is intrinsic to animals becomes the role of humans, and what is uniquely human becomes intrinsic to animals (Marx & Engels, 1994).

The worker does not labor to satisfy a need for work itself, but rather as a means to satisfy other needs. This is forced labor, which transforms the species-being of human life into a mere instrument for maintaining individual existence (Marx & Engels, 2000a, p.135).

Human Alienation Through Labor

In transforming the material world, humans affirm themselves as species-beings because human life activity is conscious activity. Through labor, humans elevate themselves and distinguish themselves from the animal world. However, when

Alienated labor estranges the physical body of man, the natural environment outside him, and the spiritual essence of man—his human essence—it becomes alien to him (Marx & Engels, 2000a, p.138).

Under these circumstances, labor and life activities are reduced to merely maintaining physical survival. The result of this alienation from the product of their labor, from their life activity, and from their species-being leads to the alienation of humans from one another:

When man is confronted with himself, he is also confronted with other men (Marx & Engels, 2000a, p.138).

In summary, Marx's theory of labor alienation reflects the reality of capitalist production. While capitalism generates unprecedented productivity, it simultaneously reduces labor to a fragmented, dehumanized activity, stripping it of its intrinsic human essence.

2. New Manifestations of Labor Alienation in the Digital Era

In the digital era, Marx's theory of labor alienation retains its relevance while gaining new and more subtle manifestations. These are reflected as follows:

Labor Alienation through the Alienation of Science and Technology

As early as the 19th century, Marx pointed out the dual nature of technological advancements: they not only facilitate human production but also bring poverty and misery to workers. In capitalist society, machines do not directly function to alleviate human labor; instead, they serve as tools for increasing surplus value for capitalists. Humans fundamentally possess two forms of labor power—manual and intellectual. In previous eras, when machines replaced manual labor, humans could still engage in intellectual labor. However, in the digital era, artificial intelligence (AI) is replacing humans even in intellectual labor, leading to a new form of alienation—alienation into “uselessness.” This concept reflects the large-scale loss of jobs for workers in the digital age. Researchers Carl Benedikt Frey and Michael Osborne from Oxford University project that by 2033, 94% of paralegals, 97% of cashiers, 96% of chefs, 98% of sports referees, 94% of waitstaff, and 99% of telemarketers and insurance agents will become redundant, replaced by robots or algorithms. Jobs least likely to be replaced by AI are those that are low-profit yet extremely challenging (Frey & Osborne, 2013). This reveals a paradox: while humans invent AI through technological advancements to increase labor productivity, these tools, in turn, strip the majority of workers of their value as employable labor. AI essentially digitizes human cognitive processes based on large-scale data. With computation speeds vastly superior to the human brain, AI outperforms humans in specialized fields, further exacerbating labor alienation.

Of course, new jobs have emerged, such as virtual world designers or AI programmers. However, these professions demand a high degree of creativity and flexibility, which only an elite group of workers can meet. Even for those capable of taking on these roles, the rapid pace of digitization imposes immense pressure. They must constantly race against the advancement of intelligent machines. This relentless pressure leads to stress and psychological harm, explaining the rise of stress-related disorders, depression, and even suicide in modern society. Labor no longer enhances human life, joy, or happiness; instead, it exhausts individuals both physically and mentally, sometimes pushing them toward self-destruction.

When Labor Is Downgraded to “Useless” Activities, Humans Become “Meaningless” Beings

The use of machinery in capitalist production renders humans increasingly dependent on machines. Marx predicted:

All our inventions and progress appear to result in endowing material forces with intellectual life, and in degrading human life into a mere physical existence. (Marx & Engels, 2000b, p.10).

In the digital era, the emergence of AI appears to imbue machines with a form of intellectual life, while workers themselves become increasingly hollow. Labor, once intrinsic to humans, allowed them to transform nature and, in doing so, transform themselves, elevating their existence above the animal world. Humans differ from animals in their ability to labor and create in their work:

An animal produces only what it immediately needs for itself or its young, whereas man produces universally; he produces in freedom from physical need, and only truly produces in freedom. Man therefore forms things in accordance with the laws of beauty. (Marx & Engels, 2000a, p.137).

However, in the digital age, humans are gradually losing their creativity, instead following the programming of machines. Intelligent machines reduce labor to its simplest expressions, eliminating the need for skills, judgment, and even physical exertion. These formerly essential human qualities are no longer required, as machines dominate more aspects of work.

Humans gradually lose trust in their own judgment and willpower when machines can perform these functions better. As algorithms make increasingly accurate decisions, people begin to lose faith in their emotions and personal agency. This process signifies a shift in decision-making authority from individual will to intelligent algorithms. At this point, human existence becomes “meaningless.”

The Frankfurt School of Neo-Marxism described this phenomenon as: “Regression concealed within progress, barbarism accompanying civilization; the greater the progress, the deeper the regression, and the more developed the civilization, the greater the threat of barbarism” (Luu, 2004, p. 684).

Workers Become Entities Deprived of Freedom

Previously, workers were only deprived of freedom in their labor activities (as their labor power belonged to others). However, today they are also losing freedom in their consciousness and thoughts. Through big data technology, the entire inner world of humans can be measured and quantified. This data enables algorithms to understand the internal world of individuals and guide decisions according to the intentions of those who control the data.

To enhance labor productivity, new technologies have emerged, such as Affective and Emotional Labour, which involves emotions, mental states, and interactions with customers or colleagues. According to Moore (2018b), the measurement and monitoring of emotions have become tools to assess employee productivity and adaptability. The measurement of emotional labor is not aimed at compensating employees but rather at managing and predicting their potential collapse or resistance:

Workers are subject to increasingly intimate tracking and monitoring and their every move surveilled. Agile workers are prepared for constant change, happy to make personal changes, always on the move, always trackable (Moore, 2018b, p.9).

If this technology continues to develop, employers could understand workers' thoughts in real-time, every second and minute. At that point, workers would lose freedom not only in their physical world but also in their mental world. When the inner world is guided by algorithms and this extends into the socio-political realm, humans will become "digital slaves" living in "digital dictatorships," controlled by the owners of "omnipotent" algorithms, all under the guise of a new form of democracy and freedom.

3. The Alienation of Labor in the Digital Age Foreshadows a New Crisis of Capitalism

Since its inception, capitalism has undergone cyclical crises, as such crises are inherent to its nature. The first major crisis was the Great Depression and economic downturn of 1929–1933, during which millions of tons of goods were discarded into the sea because they could not be sold. This was the result of anarchic commodity production, where supply exceeded society's purchasing capacity. Millions of people starved, and hyperinflation devastated Germany and several Western European countries. Capitalism nearly collapsed had it not reformed itself under the New Deal policy initiated by Franklin D. Roosevelt and the effective demand theory of J.M. Keynes. The second crisis stemmed from the sudden contraction of physical space, marked by the collapse of large sections of colonial systems following World War II. The rise of working-class movements and the strengthening of socialist tendencies within capitalist societies forced capitalism to adapt for survival and growth. The third crisis occurred between 1974 and 1975, commonly referred to as the oil crisis. A sharp rise in oil prices caused the average profit rate of capital to plummet rapidly. Fundamentally, this was a crisis linked to the limits of profit rates. Physical space became constrained (due to resource depletion), while the accelerated development of new technological forces significantly impacted capital's profit margins. The productive capacities of technologically advanced nations became excessively large, while the markets approached saturation. Between 1990 and 1995, global industrial production grew by only 10%, while global trade increased by 43%, yet products remained unsold (Đỗ, 2003, p. 29–30). The issue was not a lack of societal demand but the inability of many individuals to afford goods at a level that would ensure sufficient profitability for capitalists. The only solutions were to innovate new technologies that reduced production costs, thereby increasing consumer purchasing power, or to create novel technologies capable of generating extraordinary profits.

The advent of a new scientific and technological revolution, spearheaded by information technology and the transition to a knowledge economy, along with the acceleration of globalization (essentially the expansion of the global capitalist market), has become the primary lifeline for contemporary capitalism. The Fourth Industrial Revolution—marked by digitalization—emerged within this context. The achievements of digital transformation have significantly increased labor productivity and reduced production costs, thereby stimulating consumer demand, precisely aligning with the objectives of capitalism. However, the downside of this process is a decreasing need for "living" labor, which inevitably leads to widespread unemployment. In modern society, the working class simultaneously assumes two roles: as laborers and as consumers. When workers are unemployed and have no income, they lose their purchasing power for the goods and products manufactured by

capitalists. While the digital economy creates limitless productive capacity, society lacks the means to afford it. This paradox poses not only a catastrophe for workers but also a crisis for capitalists, as their goods remain unsold. This is a vivid manifestation of the contradiction between the socialized forces of production and the privatized capitalist relations of production over the means of production in the digital age.

The new manifestations of labor alienation in the digital age foreshadow a fresh crisis for capitalism. It appears that in anticipation of the seismic shifts brought about by the digital era, capitalist governments are currently implementing a series of measures to tighten control over digital technology platforms. Historically, every time a crisis arises, capitalism adapts and adjusts itself to progress into a new phase of development. However, all such efforts remain temporary, as the fundamental contradictions of capitalism are merely “preserved in cold storage” within these societies.

4. The Causes of Labor Alienation in the Digital Age

Karl Marx identified the causes of labor alienation as rooted in the capitalist system of private ownership of the means of production and the antagonistic nature of the division of labor. In the digital age, this observation remains highly relevant.

First, the capitalist private ownership of the means of production continues to drive labor alienation. As Marx noted,

Machinery is humanity’s triumph over the forces of nature, yet its capitalist use enslaves humans to those forces (Marx & Engels, 1995, p. 630–631).

. In the digital era, artificial intelligence (AI) is not inherently the cause of labor alienation; rather, it is its application within the capitalist system that exacerbates this condition. Fundamentally, the root cause lies in the capitalist private ownership of the means of production. Today, big data has become the most crucial input for intelligent production processes. Thus, ownership of data equates to ownership of the means of production. A vast amount of information that was previously impossible to quantify, store, analyze, or share has now been transformed into data in the digital era. The ability to possess a large volume of data, even if much of it remains unrefined, has opened new doors for deeper insights into our world (Mayer-Schönberger & Cukier, 2020). Consequently, data has become a valuable asset that can be owned and traded. Furthermore, data is increasingly becoming a critical resource with the potential to be monopolized within the framework of the market economy. The more data is accumulated, the easier it becomes to create intelligent algorithms.

Currently, the vast reservoirs of data in capitalist countries remain under private ownership. If data ownership continues to be dominated by private corporations, these data repositories will primarily serve the purpose of maximizing economic profits for these corporations. They will develop big data technologies to optimize profits, with little concern for the risks of labor alienation. Capitalists who own large datasets and intelligent machines use these tools to increase surplus value, turning these extraordinary instruments into vivid examples of the dominance of “reified labor” over “living labor.” As intelligent algorithms push humans out of the labor market, wealth and power become increasingly concentrated in the hands of a small, extremely wealthy class that owns these algorithms. This dynamic gives rise to some of the most acute manifestations of labor alienation.

Second, the Division of Labor in Society. Karl Marx asserted that:

The division of labor and private ownership... are synonymous terms: the first is viewed in terms of activity, and the second in terms of the products of that activity (Marx & Engels, 2004, p. 46).

Different stages of the division of labor also correspond to different forms of ownership. The division of labor in society serves as the foundation for specialization in production, resulting in groups of people being perpetually dependent on specific types of work. Today, humans are increasingly vulnerable to replacement by machines—not only because algorithms are becoming more intelligent but also because humans are becoming more specialized. Individuals often belong to narrowly defined fields, making it much easier for AI to replace them. This is because AI is fundamentally designed to digitize and automate repetitive human tasks. While the prospect of AI replicating a fully human-like version remains unlikely, it only needs to surpass human capability in a specific, specialized area to push humans out of the labor market. In capitalist societies, new tools and technologies have always competed with workers from the moment their economic advantages become evident. These advantages are only accessible to those who own the means of production. AI becomes a direct competitor to workers when it is owned and controlled by capitalists.

5. Solutions to Address Labor Alienation in the Digital Age

First, Controlling Data Ownership

In the digital age, capitalists who own data and intelligent machines have gained disproportionate benefits, while workers have lost everything, including the ability to sell their labor power. This severe imbalance is a defining feature of the digital era. According to Marx, imbalance is an inherent characteristic of commodity production, but in the digital age, it has reached its peak. Data, now the essential input for AI and other intelligent algorithms, must be recognized as a means of production—owning large datasets is tantamount to owning the means of production. However, data is far more difficult to control than land or machinery because it is omnipresent, entirely intangible, infinitely replicable, and can travel at the speed of light. For the vast reservoirs of data that humanity generates daily, it is not only necessary to revolutionize their transformation into social ownership but also to establish entirely new mechanisms of control, distinct from those used for traditional resources.

If humanity wishes to prevent the concentration of wealth and power in the hands of a small elite, the solution lies in regulating data ownership. As Harari states,

In the 21st century, data will eclipse the importance of land and machinery to become the most critical asset, and politics will be a battle to control the flow of data (Harari, 2019, p. 105).

The question of how to regulate data is the most pressing political challenge of this era. Currently, large data corporations such as Google, Facebook, Twitter, and YouTube control the data of billions of users. How to manage these vast data repositories remains a complex issue. There are no guarantees that these corporations will not form alliances with businesses or political groups to leverage algorithms for manipulating and influencing users.

The UNDP asserts that:

Current technological advancements will require stronger antitrust policies and laws to ethically regulate the use of data and artificial intelligence (p. 19).

Strengthening the legal framework and regulatory measures for data governance is a key solution to mitigating the negative impacts of data monopoly on equality and democracy. First and foremost, it is essential to enact and enforce antitrust laws specifically targeting data monopolies. Such measures can curb the accumulation of excessive data by large technology corporations, which creates unfair advantages and facilitates social manipulation. Requiring the sharing of critical data with independent agencies or the scientific community could help reduce monopolies and enhance transparency. Additionally, laws protecting personal data must be established, akin to the General Data Protection Regulation (GDPR) of the European Union. These regulations ensure user privacy while preventing the misuse of data for surveillance, analysis, or discriminatory practices (European Union, 2016). Another critical requirement is to increase transparency in the operations of technology companies. They must disclose how they collect, use, and develop data and algorithms for decision-making, enabling users to understand and monitor the impact of data on their rights. Strengthening the legal framework not only helps regulate the power of data monopolies but also ensures fairness, transparency, and the protection of citizens' rights in the digital age.

Establishing independent oversight mechanisms is an urgent requirement for controlling data exploitation and usage, while enhancing transparency and fairness in the digital environment. First, it is essential to establish data governance bodies at national or international levels. These bodies would be tasked with monitoring the data exploitation activities of technology corporations and ensuring compliance with legal regulations. Such institutions would also bear the responsibility of supervising, evaluating, and addressing violations related to personal data and data transparency.

Technological changes do not occur in isolation; they are shaped by economic and social processes. These changes are the result of human action. Policymakers can steer technological advancements in ways that enhance social equity. For example, artificial intelligence may replace tasks traditionally performed by humans, but it can also rejuvenate labor by creating new tasks for people, generating positive effects that have the potential to reduce inequality.

Second, Utilizing Science and Technology to Address Labor Alienation

The digital age not only alienates workers but also transforms capitalists, who cease to remain their authentic selves. Capitalists must fiercely compete to expand markets and pursue profits, but industrial civilization is reaching its limits, with everything gradually approaching a breaking point. In this struggle for survival, capitalists increasingly undermine each other, losing their "species essence" in the process. As a result, the development of science and technology further deepens the fundamental contradictions of capitalism. Workers, therefore, need to view science and technology as a new resource for self-liberation. Developing technology and decentralized governance mechanisms is a crucial solution to minimize the negative effects of labor alienation. For instance, blockchain technology can be employed to manage and distribute data in a decentralized manner. Blockchain functions as a transparent and secure digital ledger, ensuring data security, integrity, and preventing monopolies by eliminating centralized control over data by a few entities or individuals. Compared to traditional technologies, blockchain stands out due to its decentralized nature,

data traceability, and resistance to tampering. These characteristics make blockchain a critical tool in combating news fraud, protecting intellectual property rights, and enhancing transparency in governance issues. Additionally, open data models should be promoted to develop transparent and publicly accessible data systems, allowing equal participation of individuals and organizations under neutral oversight. This approach strengthens fairness and limits the concentration of data power in the hands of a few entities.

Moreover, privacy-protecting technologies such as data encryption and ethical AI must also be developed to prevent the misuse of data for citizen surveillance or discriminatory purposes (AI Now Institute, 2019). The establishment of an interdisciplinary and international AI Ethics Council is essential. This council would evaluate and audit AI systems to ensure that they operate transparently, fairly, and without creating forms of discrimination. The council could propose ethical standards, provide guidance for technology developers, and act as a safeguard to mitigate societal harms. Establishing independent oversight mechanisms would bolster public trust and ensure that AI systems and data serve the common good without conflicting with human interests.

Moreover, halting the development of digital technology is impossible. However, we must implement solutions to guide its growth toward a more humane and democratic direction, ensuring that science and technology serve humanity rather than profit. When this is achieved, labor will return to its original essence—voluntary, conscious, and dignified—labor as a source of glory.

Third, Developing Holistic Human Potential

To liberate humanity from labor alienation, it is not sufficient to merely regulate data ownership; a comprehensive strategy for holistic human development is also required. The causes of labor alienation are not only tied to the ownership of the means of production but also to the social division of labor, which leads to excessive specialization. While specialization increases labor productivity, it also pushes humans toward one-sided, fragmented development, making them easily replaceable by AI. How can we continue developing these technologies while ensuring employment opportunities for humans? We must revisit Karl Marx's perspective: allowing individuals to work with passion and according to their intrinsic needs, liberating them from the specialized labor dictated by the social division of labor. He wrote:

No one is restricted to a single, exclusive sphere of activity, but each individual can develop themselves in any field they prefer, with society regulating production so that I can hunt in the morning, fish in the afternoon, rear cattle in the evening, and engage in critical reflection after dinner, as I please, without ever becoming a hunter, fisherman, herdsman, or critic (Marx & Engels, 2004, p. 47).

This idea represents an early concept of holistic human development in Marx's philosophy. Holistic development does not mean excelling in every field but rather cultivating all four dimensions—physical, intellectual, emotional, and spiritual—enabling individuals to find happiness and balance in life. Additionally, the exploration of human potential and abilities must also take a more comprehensive approach. Currently, we invest heavily in developing artificial intelligence but far too little in understanding human consciousness. This imbalance may lead to AI developing too rapidly while human consciousness remains underexplored. To prevent such outcomes, alongside investing in AI development, we must also invest in researching human consciousness. So far, humanity

has no clear understanding of the full extent of human potential because we know too little about consciousness. As Harari describes, human consciousness remains a vast, uncharted ocean, with our current research akin to a small boat on its surface (2018).

CONCLUSION

The digital age is unlocking limitless potential for socio-economic development while simultaneously presenting unprecedented challenges to the future of society. This is because the private ownership of the means of production, particularly the private ownership of big data in this era, exacerbates the problem of labor alienation, ultimately leading to human alienation. This alienation will become an “intolerable force,” one that compels revolutionary action, as it reduces the majority of humanity to trivial, hollow, and unemployable existences, starkly contradicting a world brimming with wealth and knowledge (Marx & Engels, 2004). If the new manifestations of labor alienation are not recognized and addressed, they will deepen the conflicts and contradictions of modern society, leading to fresh economic and social crises in the future. Therefore, solutions to overcome labor alienation must be implemented immediately.

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ARTÍCULO DE INVESTIGACIÓN

La importancia de la educación continua de los funcionarios públicos para la eficiencia de la administración pública

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Resumen. El objetivo de este trabajo fue estudiar el papel y la importancia del sistema de educación continua de los servidores públicos para mejorar la calidad de la administración pública y optimizar la prestación de servicios públicos a la población. La investigación utilizó el método analítico, el método funcional-estructural, el método de análisis comparativo, el método de evaluación de expertos, el análisis estadístico, el método de estudio de casos y el análisis de sistemas. La investigación identificó la necesidad de implementar un enfoque sistemático para la capacitación de los servidores públicos, incluyendo programas educativos adaptativos, alfabetización digital, un sistema de mentoría y cooperación internacional. Se encontró una relación entre el nivel de formación profesional de los servidores públicos y el nivel de confianza de los ciudadanos en los órganos gubernamentales. La formación continua de los funcionarios públicos puede mejorar significativamente la calidad de los servicios públicos prestados a las empresas y a la población, así como acelerar la eficiencia del funcionamiento del aparato administrativo estatal. La creación de amplias oportunidades para un programa de formación flexible para los servidores públicos, que les permita combinar el desempeño de sus funciones profesionales y su formación, permitirá involucrar eficazmente a las diversas categorías de servidores públicos en el proceso de formación continua.

Palabras clave: formación continua de funcionarios, funcionarios, formación avanzada.

The importance of continuing civil servants' education for the effectiveness of public administration

Abstract. The purpose of this research was to study the role and importance of the continuous education system with civil servants to improve the public administration quality and optimize the provision of public services to the population. The research used the analytical method, the functional-structural method, the comparative annalistic method, the expert assessment method, statistical analysis, the case study method and the system analysis. The research established the need to introduce a systematized approach to training civil servants, including adaptive educational programs, digital literacy, a mentoring system and international cooperation. The relationship between the professional training level of civil servants and the citizens level trust in government bodies was revealed. Continuous civil servants' education can significantly improve the public service quality provided to enterprises and the population, as well as accelerate the efficiency of the state administration apparatus. Creating broad opportunities for a flexible educational schedule for civil servants, which would allow them to combine their professional duties and training, will effectively involve various civil servant categories in the continuous educative process.

Keywords: continuing civil servants' education, civil servants, advanced training.

INTRODUCTION

Professional skills and educational level of civil servants are the most important criteria that directly affect the service quality they provide to the population. A high competence level of civil servants determines their ability to quickly respond to changes in the socio-economic and political environment, develop and implement effective management decisions, and ensure transparency and accessibility of public services. Competent specialists are able to work with the population more quickly, correctly and respectfully, which helps to increase citizen satisfactory level with public services and strengthen trust in government institutions. A civil servant must have not only professional knowledge, but also developed communication skills that allow them effectively conduct a dialogue, explain legal and administrative issues, and prevent possible conflicts. Polite and competent advice to citizens increases their confidence in government agencies and help improve the overall perception of the government agency work. In addition, the ability to clearly and accessibly explain complex administrative processes makes interaction with government agencies more convenient and transparent for citizens. This is especially important in the context of digital transformation, when government services are increasingly provided online, and high-quality communication helps people quickly adapt to new services.

In the scientific works of the authors G. Kholod, A. Nazaryan, Y. Starushchenko, I. Lopushynskyi, V. Kukhar, the emphasis is placed on the automation of the civil servant's workplace, which plays an important role in improving public administration efficiency. The introduction of modern digital technologies helps to speed up bureaucratic procedures, reduce bureaucratic barriers and improve the service providing quality. The use of digital platforms makes public services more accessible to citizens, allowing them to receive necessary information and complete documents online,

without having to personally visit government agencies. This significantly saves time for both citizens and civil servants, reducing the burden on the administrative apparatus. However, digitalization requires new competencies from civil servants related to work in a digital environment, cybersecurity, data analysis and adaptation in rapidly changing technologies. In this regard, continuous training and advanced training of civil servants in the digital governing field is in particular importance. Thus, automation and public administration digitalization not only simplify administrative processes, but also require continuous development of professional skills of civil servants, which ultimately contributes to the formation of a more efficient, transparent and citizen-oriented public administration system.

According to the authors T. Kopyl-Filatova, I. Rozic, M. Ljubić, the professional training level of civil servants plays a key role in building citizens' trust in government bodies. Competent and qualified specialists are able to perform their duties more effectively, ensuring transparency, efficiency and high quality of services provided. When civil servants have sufficient knowledge, skills and professional competencies, they are able to make informed management decisions, solve socio-economic problems and take into account the interests of the population. This, in turn, contributes to an increase in the level of citizen satisfaction with interactions with government agencies and strengthens their confidence in the fairness and effectiveness of government bodies. In addition, a high level of training of civil servants reduces the likelihood of corruption, bureaucratic barriers and administrative errors, which also has a positive effect on the perception of the state by citizens. In the context of modern digitalization and growing public expectations, the need for continuous training and professional development of civil servants is becoming an integral factor in successful public administration.

In today's globalized world, international cooperation is in particular importance. States are increasingly faced with complex challenges that require joint efforts and the exchange of best practices. In these conditions, a high training level of civil servants is becoming not only a factor in the internal public administration effectiveness, but also an important condition for successful interaction in the international arena. Competent and well-trained civil servants can actively participate in international projects, contributing to the introduction of advanced technologies, improving management processes and enhancing public quality services. They are able to effectively adapt and use foreign experience, modernizing national institutions and creating favorable conditions for the socio-economic development of the country. In addition, a high professional training level allows civil servants to represent the interests of their country in international negotiations, develop and implement strategic initiatives, and contribute to strengthening diplomatic and economic ties. In the globalization and digital transformation era, international cooperation is becoming the most important resource for increasing the competitiveness of the state, and qualified specialists play a key role in this process.

To ensure sustainable state development, civil servants must have deep knowledge in key areas such as economics, law and ecology. These competencies allow them to make balanced and informed decisions aimed at the rational use of public resources, ensuring a balance between economic growth, social stability and environmental protection. Competent management of public resources requires officials not only professional training, but also the ability to adapt to changing conditions, take into account international experience and implement innovative approaches. In this context, investing in the training and retraining of civil servants is becoming a strategically important factor contributing to the public administration modernization and its compliance with international

standards. In addition, improving the skills of civil servants directly affects the life quality improvement of the population. Effective management decisions based on modern knowledge allow us to optimize public spending, increase the social supporting level, improve the environmental situation and form transparent mechanisms for interaction between the government and society. As a result, citizens' trust in state institutions is growing, which is an important basis for the stable and sustainable development of the country.

Modern civil servants are faced with a number of requirements, the fulfillment of which guarantees their professionalism level, competence and corresponds to the tasks facing public administration (Fig. 1).

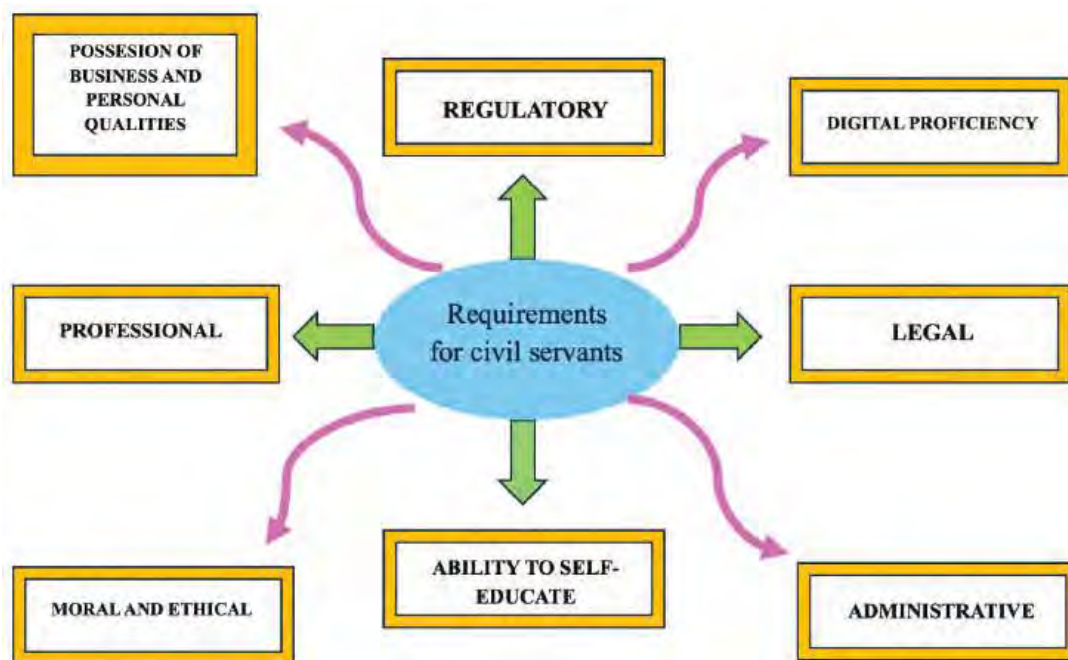


Fig. 1. Requirements for civil servants (adapted by the authors).

Modern challenges such as digitalization, globalization and the increasing complexity of social processes require continuous professional development from civil servants. The rapid spread of new technologies, changing socio-economic conditions, increasing demands from society and need to work in uncertain conditions make professional training of civil servants not just desirable, but a necessary condition for effective management.

Insufficient qualifications can lead to ineffective management, slow administrative processes, decreased citizen trust in government institutions, and poor decision-making quality. In digital transformation context, a lack of IT competencies can slowly down the implementation of automated management systems, which in turn hinders citizens' access to government services and reduces their quality. In addition, the lack of modern management skills among officials can lead to untimely responses to crises, inefficient resource allocation, and bureaucratic barriers.

In this regard, continuous civil servants' education is becoming a key tool for improving their professional competence. Advanced training, retraining and additional educational programs allow

them to master new technologies, improve management skills, adapt to changes in legislation and implement best international practices. This is especially important in the context of the country's integration into the global community, when it is necessary to take into account international standards and use advanced foreign experience.

In addition, the development of a continuous education system contributes to the formation of a professional culture among civil servants, motivating them to self-improvement and responsibility for their work quality. The introduction of distance learning technologies and digital platforms makes training more accessible and flexible, which is especially important for employees working in remote regions.

Thus, investments in the education and development of civil servants are a strategically important area that contributes to increasing the public administration efficiency, improving the service quality provided and strengthening citizens' trust in the government. The modern state apparatus should be not only an administrative structure, but also a dynamic system capable of constant renewal and improvement, corresponding to the challenges of the time and social expectations.

METHODS

In the course of this research, the authors used a comprehensive approach studying the continuous educative problems of civil servants. The research used various methods to comprehensively study the continuous educative system of civil servants, identify key effective factors and determine development paths. The analytical method provided a comprehensive analysis of existing approaches to continuous public administration personnel training, revealing its importance and the main factors influencing the system effectiveness. To structure knowledge about the continuous educative role in the public administration system, a functional-structural method was used, which made it possible to determine the relationship between the level of civil servants training and the service quality they provide. Comparative analysis made it possible to study international experience in organizing a continuous education system, identify the features of various educational models and assess their applicability in domestic practice. Additionally, the expert assessment method made it possible to collect the opinions of leading experts in the public administration and education fields, which helped to identify existing problems and outline ways to solve them. To process empirical data, the statistical analysis method was used, which made it possible to assess the professional training dynamics of civil servants, identify the main trends and predict the further system development. In addition, the use of the case study method (study specific cases) provided a real example analysis of the educational program implementation in public institutions, which made it possible to identify the most effective advanced training methods. Finally, the system analysis method made it possible to consider continuous education as an integrated public administration system element, taking into account the impact of personnel policy, digital transformation, socio-economic conditions and international standards.

The use of these methods in combination made it possible to provide a comprehensive approach to the study of the problem and develop recommendations for improving the continuous educative system of civil servants.

RESULTS

In our opinion, the continuous educative system of civil servants is of paramount importance for creating the preconditions for effective public administration for a number of reasons.

State legislative and executive authorities, in the process of performing their functions, issue various normative documents, amendments to existing normative acts. As a result, civil servants must know these changes in order to be guided by them in their professional activities. In the conditions of continuous scientific and technical progress, new technologies are constantly emerging. Civil servants must be familiar with these technologies and, if possible, be able to apply them in their professional activities.

Qualified and professionally trained civil servants are able to more effectively and quickly solve the problems that society and citizens pose to them.

Continuous education of government officials at all stages of their professional careers makes it possible to implement modern management methods and technologies in practice. This, in turn, not only increases the efficiency using government resources, but also allows for an increase in labor productivity, and makes it possible to effectively solve complex production problems.

The sustainability and public administration stability largely depends on the knowledge continuity and the formation system of a personnel reserve for the civil service. This ensures the stability of the system state power functioning in economic and political crises conditions.

Particular attention should be paid to the formation of a personnel reserve of senior staff for the public administration system. They must have skills in strategic planning, conflict management and leadership qualities, and be able to organize teamwork among their subordinates. Heads of government agencies must have skills in motivating and inspiring their subordinates, and effectively use financial, material and labor resources.

This requires a permanent system of training and advanced training courses for lower and middle-level civil servants.

Globalization of economic relations inevitably affects the work of governmental bodies. Continuous civil servants' education creates opportunities to effectively implement the requirements of international practices and standards in their professional activities.

In our opinion, the continuous educative system of civil servants should be multifaceted, meet modern standards of civil service and be systematic. Continuous civil servants' education, on the one hand, should contribute to the successful development of their professional career, and on the other one, assist in increasing the efficiency of the public administration system.

- 1) In this regard, the public educative system of civil servants should, in our opinion, meet the following criteria:
- 2) Education should be based on a competency-based approach; it should, first of all, be focused on solving specific typical professional tasks.
- 3) Civil servants' education should be an integral part of their career and include various trainings, advanced training courses and, if necessary, professional retraining.
- 4) It is necessary to combine various training forms and methods, which should include traditional seminars and lectures and distance learning methods. The introduction of a mentoring

system, within which more experienced employees pass on their experience and knowledge to new employees, deserves attention.

- 5) Civil servants' education should be taken into account the career plans, level of previous trainings and professional natural duties of each specific civil servant. Training programs should be individual in nature, which would allow students to choose the courses to be studied in accordance with the specifics of their professional activities.
- 6) Civil servants' education should primarily develop their digital literacy and the ability to work with information platforms and systems.
- 7) Civil servants' education must be flexible and must provide for the opportunity to improve their professional level in a convenient place, at a convenient time, and including without interrupting the civil servant's performance of his professional duties.
- 8) In the state civil servants' education system, it is important to monitor the quality of such education and the certification system of the competencies obtained as a training result. It is especially important that there is a close correlation between the advancement of a civil servant up the career ladder and success in improving his professional level through continuous education.
- 9) In order to ensure the civil servants' education quality, in our opinion, it is necessary to use not only training in specialized state educational institutions, but also to actively participate in international educational programs such as Erasmus.

DISCUSSION

The system of continuous civil servants' education should promote their professional growth, the ability to more effectively perform their professional duties, and also to maximally correspond to the goals and objectives of public administrations. The system of continuous civil servants' education should be continuous and systematic.

To improve the professional training level of civil servants, it is advisable to use universities and specialized advanced training courses.

To ensure high training civil servants' efficiency, it is necessary to actively combine various methods and training forms, which may include internships (including abroad), participation in MBA programs, short-term advanced training courses, as well as webinars and other distant educative forms.

Modern civil servants must have the skills to work with electronic platforms and knowledge bases, and be able to use artificial intelligence in their work.

The interaction effectiveness between civil servants and citizens in the process providing them with public services requires civil servants to be stress-resistant and have communication skills.

Motivation and stimulation of this educational activity is of great importance for the functioning of the training and retraining systems of civil servants. It is necessary to ensure conditions under which the successful career of a civil servant correlates with the professional competent growth.

CONCLUSION

Continuous civil servants' education plays a key role in improving the public administration efficiency and the quality of services provided to the population. The conducted research allowed us to draw the following conclusions: civil servants with relevant knowledge and competencies are able to quickly respond to changes in legislation, implement innovative technologies and provide a high service level to citizens.

A high-quality training system that civil servants contributes to the public confidence growth in government bodies, since professionally trained specialists demonstrate competence, ethics and respect for citizens. The introduction of automated systems and digital technologies in the process providing public services requires new knowledge and skills from employees, which helps to reduce bureaucratic barriers and increase the processing request speed. In globalization context, civil servants must have knowledge of international standards and management practices, which will allow integrating the best world approaches into the domestic public administration system. Civil servants' education should be adaptive, take into account the specifics of their professional activities and include various forms of training, such as distance courses, trainings, mentoring and international educational programs. Civil servants' career growth should directly depend on their professional training and participation level in advanced training programs, for which it is necessary to develop a motivation system that includes financial and non-financial incentives. An effective continuous educative system allows you to form personnel highly qualified reserved specialists with the necessary leadership qualities and strategic thinking. Continuous educative development system should be part of state policy aimed at sustainable development and increasing the efficiency of public resource management.

Thus, the modernization of the continuous civil servants' educative system will not only improve their professional level, but also create conditions for effective government management focused on the needs of citizens and modern challenges.

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ARTÍCULO DE INVESTIGACIÓN

Claves para la formación del docente de escuela básica ante los problemas sociales del siglo XXI. Modelos pedagógicos y propuestas políticas

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Resumen. Las preocupaciones globales emergentes, como el desempleo derivado de la automatización, la brecha digital y los retos asociados a la migración, exigen repensar el sentido y la aplicación de los modelos pedagógicos en la educación básica. En este escenario, el docente se convierte en un agente de transformación social, cuya labor va mucho más allá de la simple transmisión de contenidos, involucrando decisiones con profundas implicaciones políticas y sociales. El objetivo de este trabajo fue discutir críticamente las claves materiales, éticas y epistemológicas que configuran la formación docente, entendiendo al maestro como actor inmerso en problemáticas sociales que inciden directamente en los procesos de enseñanza-aprendizaje. Para ello, se utilizó una metodología hermenéutica y documental, seleccionando fuentes académicas de reconocido prestigio y actualidad. Los hallazgos muestran que la pretendida neutralidad educativa perpetúa las desigualdades existentes y favorece el statu quo. Por tanto, se recomienda que la formación docente incorpore el análisis de casos históricos en los que la educación fue utilizada como herramienta de dominación, así como experiencias de resistencia pedagógica. Esta perspectiva permite comprender que educar implica siempre un posicionamiento político, ideológico y social, indispensable para afrontar los desafíos del siglo XXI y construir una escuela más justa y democrática.

Palabras clave: problemas sociales del siglo XXI, formación docente, modelos pedagógicos, escuela básica, propuestas políticas.

Keys to basic schoolteacher training in the face of the social problems of the 21st century. Pedagogical models and policy proposals

Abstract. Emerging global concerns, such as unemployment resulting from automation, the digital divide and the challenges associated with migration, require rethinking the meaning and application of pedagogical models in basic education. In this scenario, the teacher becomes an agent of social transformation, whose work goes far beyond the simple transmission of content, involving decisions with profound political and social implications. The objective of this work was to critically discuss the material, ethical and epistemological keys that shape teacher training, understanding the teacher as an actor immersed in social problems that directly affect the teaching-learning processes. For this purpose, a hermeneutic and documentary methodology was used, selecting academic sources of recognized prestige and current relevance. The findings show that the pretended educational neutrality perpetuates existing inequalities and favors the status quo. Therefore, it is recommended that teacher training should incorporate the analysis of historical cases in which education was used as a tool of domination, as well as experiences of pedagogical resistance. This perspective makes it possible to understand that educating always implies a political, ideological and social positioning, indispensable to face the challenges of the 21st century and build a fairer and more democratic school.

Keywords: social problems of the 21st century, teacher training, pedagogical models, basic school, policy proposals.

INTRODUCCIÓN

En general, el siglo XXI presenta un panorama complejo de problemas sociales interconectados que desafían a todas las sociedades modernas, más allá de sus especificidades. Según la Organización de las Naciones Unidas, entre los problemas más urgentes se encuentran la pobreza y la desigualdad, el cambio climático, la violencia contra grupos vulnerables, los conflictos armados y la contaminación ambiental (Naciones Unidas, 2025).

A estos retos se suman nuevas preocupaciones como el desempleo provocado por la automatización tecnológica, la brecha digital y los desafíos asociados a la inmigración y los refugiados. En este contexto, el docente de escuela básica se sitúa como un agente clave de transformación social, pues su labor trasciende la mera transmisión de conocimientos. Los maestros deben abordar temas sensibles como la discriminación racial, la violencia política o las desigualdades económicas, convirtiendo el aula en un espacio de reflexión crítica. En consecuencia, la formación docente debe preparar educadores para contender con estas complejas temáticas sociales, proporcionándoles herramientas teóricas y prácticas para guiar conversaciones difíciles que potencien el aprendizaje significativo.

En el mundo de hoy, la labor docente enfrenta retos adicionales que no pueden ser soslayados como la brecha digital y la discriminación tecnológica, fenómenos que constituyen una paradoja en la llamada sociedad de la información y del conocimiento. En palabras de Solazzi (2023), los educadores no solo deben dominar las tecnologías, sino también comprender cómo estas pueden agravar

o mitigar las desigualdades existentes en sus contextos específicos. Y tal como señala la UNESCO (2022), los docentes son testigos inmediatos de problemas como la violencia escolar y son los primeros en interceder para detenerla, además de proporcionar una educación que desarrolle habilidades interpersonales. Sin embargo, muchos maestros no se sienten preparados para abordar estos temas, especialmente en entornos virtuales donde resulta difícil conectar con los estudiantes.

En este contexto, el objetivo de esta investigación consiste en discutir críticamente las principales claves materiales, éticas y epistemológicas que condicionan la formación del docente de escuela básica, como agente inmerso en un conjunto de problemas sociales que, en último término, afectan los procesos de enseñanza-aprendizaje. Este propósito surge de la necesidad de repensar la educación del siglo XXI, que al decir de Tedesco (2011), se apoya en los pilares de aprender a aprender y aprender a vivir juntos.

A partir de este objetivo, nos planteamos tres interrogantes seminales: ¿Cuáles son las capacidades éticas y epistemológicas que debe desarrollar un docente para convertirse en agente de transformación social en contextos desiguales? ¿De qué manera los modelos pedagógicos contemporáneos proporcionan herramientas para que los educadores enfrenten problemas sociales desde el aula? Y ¿Cómo pueden las políticas educativas articularse con prácticas pedagógicas emancipadoras para crear sistemas que contribuyan efectivamente a la justicia social? Estas preguntas se arraigan en la convicción de que la educación no es neutral, sino una práctica situada política e ideológicamente.

Los procesos de formación docente están condicionados por modelos pedagógicos que definen prácticas educativas y configuran visiones políticas sobre la sociedad y sus posibilidades de transformación. Paulo Freire (2008), articuló esta relación al contrastar la “educación bancaria” (reproductora del statu quo) con la “educación problematizadora” que busca la liberación mediante el diálogo y la concientización.

La pedagogía freiriana revela que toda práctica educativa es inherentemente política, pues o refuerza las estructuras de dominación existentes o contribuye a su transformación crítica. De esta distinción emergen “propuestas revolucionarias” que conciben al maestro como un intelectual transformativo cuya labor implica desenmascarar las relaciones asimétricas de poder injustas. En contraste, los modelos pedagógicos tradicionales suelen asociarse con propuestas políticas conservadoras que priorizan la adaptación del individuo al orden establecido y la formación de capital humano para el mercado laboral, tal como lo explica Nussbaum (2016). La tensión entre paradigmas pedagógico-políticos se manifiesta en debates sobre reformas educativas contemporáneas. Por lo tanto, las instituciones formadoras de docentes inevitablemente transmiten, explícita o implícitamente, orientaciones sobre el rol político del educador.

El presente artículo está dividido en 5 secciones particulares pero conectadas al objetivo general de la investigación. Luego de la introducción, se describen las bases teóricas y conceptuales. Por su parte, en la segunda sección, se expone el diseño metodológico del artículo. En la tercera sección, se discute críticamente las principales claves materiales, éticas y epistemológicas que condicionan la formación del docente de escuela básica, como agente inmerso en un conjunto de problemas sociales que, en último término, afectan los procesos de enseñanza-aprendizaje. En la cuarta parte, se presenta al lector las principales conclusiones del caso, sin ninguna pretensión de generalizar resultados y, finalmente, se describe en orden alfabético el índice de las referencias documentales citadas.

MARCO TEÓRICO

Los modelos pedagógicos no se desarrollan en un campo eterio, sino en circunstancias históricas concretas, donde se articulan a políticas públicas educativas. En este orden de ideas, el Modelo Educativo Nacional de Ecuador ejemplifica cómo las concepciones pedagógicas se traducen en políticas concretas, al proponer un sistema flexible, ecléctico e interdisciplinario, organizado en torno a pilares como la contextualización cultural, la inclusión social y el desarrollo sostenible (Gobierno de Ecuador, 2023). Este modelo ilustra la interrelación entre teoría pedagógica y política educativa, demostrando cómo ambas dimensiones moldean la formación docente. Los maestros no se forman en el vacío, sino en el marco de tradiciones específicas que conllevan posicionamientos sobre la naturaleza y fines de la educación. Según Freire (1970), el punto de partida educativo es el contexto local donde se realiza la práctica, se trata entonces de un espacio de elementos económicos, sociales, políticos, históricos y culturales interrelacionados.

Esta perspectiva contextual implica necesariamente una postura sobre cómo debe organizarse la sociedad y qué papel juega la educación en ella. Los programas formativos deben hacer explícitos estos vínculos entre modelos pedagógicos y proyectos políticos, fomentando en cada momento la reflexión crítica sobre cómo las decisiones curriculares nunca son neutrales, sino que reproducen o cuestionan relaciones de poder y saber que se materializan en las constituciones políticas de cada país y en las leyes orgánicas que definen el alcance y contenido de la educación, en todos los niveles y modalidades del sistema educativo.

En el espacio cultural de lo que hoy se define eufemísticamente como el Sur Global, para superar la noción de países en vías de desarrollo, la pedagogía del oprimido de Paulo Freire (2008), ha representado una revolución conceptual con impactos tangibles en los grupos sociales más vulnerables, particularmente en América Latina. Simplificando las cosas, esta propuesta pedagógica constituye una postura ético-política que concibe la educación como práctica de la libertad y herramienta para la concientización de las masas oprimidas. Su implementación en campañas de alfabetización y programas de educación popular ha permitido a comunidades marginadas desarrollar una comprensión crítica de su realidad y, más importante aún, organizarse para transformarla. Por estos motivos, en palabras de Ocampo (2008):

En la Historia de la Educación Latinoamericana y mundial, Paulo Freire (1921-1997) es el creador de un movimiento de educación de base que tiene por objeto dar un carácter político al problema educativo. Según sus ideas, es necesario dar una concientización al oprimido a través de la educación. Dio significativa importancia a la alfabetización, pero no en forma aislada y memorística, sino con una aproximación crítica a la realidad. Se debe dar más importancia a la educación dialógica o conversacional, que a la curricular; asimismo, debe dar importancia a la praxis en la actividad educativa. Freire considera fundamental constituir y fortalecer la 'escuela popular en el ámbito latinoamericano. (2008, p. 58)

El legado freiriano se mantiene vigente en movimientos sociales y experiencias educativas alternativas que buscan responder a desafíos actuales, como la desinformación mediática o la crisis ambiental. Al postular que “nadie libera a nadie, nadie se libera solo, los hombres se liberan en comunión”, Freire (2008, p. 56) estableció las bases para una pedagogía dialógica donde el conocimiento se construye colectivamente. Esta visión ha inspirado prácticas emancipadoras en contextos diversos más allá del mundo latinoamericano, desde escuelas comunitarias hasta universidades interculturales, demostrando su potencial transformador en realidades complejas y cambiantes.

Por su parte, el modelo de capacidades humanas, desarrollado por Amartya Sen (2009) y Martha Nussbaum (2012), ha complementado las propuestas freirianas aportando un marco filosófico que vincula educación y justicia social. Esta perspectiva filosófica- pedagógica evalúa los procesos educativos, no por su valor instrumental para el crecimiento económico, sino por su capacidad para expandir libertades sustantivas que permitan a las personas vivir vidas “que valga la pena ser vividas” (Nussbaum, 2012, p. 16). En contextos del Sur Global, esta visión ha orientado políticas que trascienden los indicadores de cobertura para centrarse en cómo la educación combate la exclusión social y la pobreza.

Por su parte, el constructivismo social, al decir de Pinto *et al.*, (2019) ha aportado metodologías que reconocen los saberes locales, promoviendo diálogos que desafían la hegemonía epistemológica occidental. En su desarrollo dialéctico, estas corrientes, al articularse con movimientos sociales y políticas progresistas, han generado experiencias educativas transformadoras adaptadas a la especificidad de cada contexto. Por lo tanto, los desafíos actuales exigen recuperar estas tradiciones críticas para formar docentes capaces de responder a problemas como la xenofobia, el cambio climático o la colonialidad digital.

En un catálogo de los modelos más actuales para las realidades sociales del siglo XXI, debe mencionarse también el modelo de competencias, el cual reorganiza la formación docente al priorizar habilidades aplicables a contextos reales, como la gestión de aulas multiculturales o la mediación en entornos con alta desigualdad socioeconómica. En palabras de Vargas (2008), este paradigma, implementado en sistemas educativos diversos, integra tres dimensiones: conocimientos disciplinares, prácticas situadas y reflexión ética sobre el impacto social del quehacer pedagógico.

Un docente formado bajo este modelo adquiere capacidad para diseñar estrategias que mitiguen la brecha digital, promoviendo el acceso crítico a tecnologías en comunidades marginadas. Sin embargo, su aplicación enfrenta desafíos cuando las políticas educativas priorizan estándares cuantificables sobre procesos cualitativos, reduciendo la enseñanza a la mera certificación de habilidades para el lucro (Nussbaum, 2016). Por lo tanto, la verdadera potencia de este enfoque radica en vincular las competencias docentes con la transformación de realidades locales, donde maestros capacitados en este modelo sean capaces de integrar saberes comunitarios al currículo oficial, fortaleciendo la identidad cultural y la cohesión social de los estudiantes.

En este orden de ideas, la formación docente desde el modelo reflexivo, inspirado en las ideas de Schön (1983), convierte al aula en un laboratorio de *análisis crítico* donde se deconstruyen prácticas normalizadas, como el castigo físico o la exclusión por rendimiento académico. Desde las coordenadas de este modelo, se exige que los maestros examinen sus prejuicios culturales y replanteen su rol ante problemas como la violencia intrafamiliar o la migración forzada, comunes en contextos latinoamericanos y del Sur Global en general.

Por último, el modelo de indagación transforma al docente en un facilitador de preguntas incómodas que interpelan realidades injustas, como la contaminación industrial en zonas escolares o la discriminación étnica en materiales educativos. Al decir de Camacho *et al.*, (2008), si se logra guiar a los estudiantes en investigaciones sobre problemas de su entorno, como la escasez hídrica o la violencia de género, los maestros desarrollan habilidades para articular proyectos interdisciplinarios con impacto comunitario. De hecho, en Brasil, profesores de escuelas públicas utilizaron esta metodología para crear mapas colaborativos de riesgos ambientales, involucrando a familias en la denuncia de industrias contaminantes (Polman & Scornavacco, 2022).

CUADRO 1. Síntesis de modelos pedagógicos

Modelo Pedagógico	Principales Aportes	Implicaciones Políticas
Pedagogía del oprimido	Promueve conciencia crítica y liberación social; educación dialógica y horizontal.	Busca transformar estructuras opresivas y promover emancipación.
Modelo de las capacidades humanas	Fomenta la justicia social y la equidad, centrado en libertades sustantivas.	Orienta políticas inclusivas y equitativas, reconociendo las desigualdades.
Constructivismo social	Analiza discursos y normas sociales que construyen la realidad política.	Revela cómo los discursos de poder legitiman o excluyen actores sociales en políticas.
Modelo de competencias	Desarrolla capacidades para juicio y acción política responsable.	Promueve la formación política crítica y participación democrática.
Modelo reflexivo	Impulsa reflexión crítica sobre prácticas y estructuras de poder.	Fomenta la ciudadanía activa y cuestionamiento del poder estatal.
Modelo de indagación transformadora	Facilita la investigación participativa para el cambio social y el empoderamiento comunitario.	Impulsa políticas basadas en evidencia y participación comunitaria.

Fuente: Elaborado por los autores (2025).

El Cuadro 1 sintetiza cómo cada modelo no solo aporta a la formación docente desde una perspectiva pedagógica, sino que también tiene repercusiones directas en la manera en que se conciben, diseñan e implementan políticas educativas y sociales. En líneas generales, todos los modelos pedagógicos abordados enfrentan, a su modo, el reto de evitar la instrumentalización de la educación como estrategia para el cumplimiento curricular, en lugar de ir más allá y ser un ejercicio de ciudadanía crítica. Su mayor aporte radica en formar docentes capaces de cuestionar las narrativas hegemónicas de su tiempo y espacio determinado, para lo cual los estudiantes analizan críticamente los discursos del poder sobre su propia realidad, reconstruyendo en el proceso las memorias locales desde perspectivas marginadas, tal como propone Freire (2008).

METODOLOGÍA

La hermenéutica filosófica y el pensamiento crítico constituyen dispositivos metodológicos útiles cuando se trata de examinar las condiciones que moldean la formación docente, especialmente al considerar el entramado social que circunda y permea la práctica educativa cotidiana. Como señala Miranda (2006), la aproximación hermenéutica crítica permite develar las estrategias de legitimación que utilizan las clases dirigentes mediante racionalizaciones discursivas funcionalistas o tecnocráticas, para ocultar el verdadero papel de la política educativa y curricular. Por lo tanto, esta perspectiva metodológica supera la descripción de problemas sociales, profundizando en las estructuras de poder subyacentes y sus repercusiones en los procesos formativos, revelando cómo los docentes se convierten en agentes inmersos en tensiones sociales, económicas y políticas que moldean tanto su identidad profesional como sus posibilidades de acción pedagógica.

Para garantizar la solidez académica de la investigación, se establecieron criterios rigurosos de selección documental, priorizando fuentes que cumplieran con estándares de relevancia temática,

autoridad académica comprobada y actualización de contenidos. Según los parámetros establecidos por la técnica de investigación documental, se evaluó la autenticidad de cada fuente, verificando su procedencia institucional y propósito académico (American Educational Research Association, 2025). Mas específicamente, se privilegiaron artículos publicados en revistas arbitradas e indexadas en bases de datos internacionales, y obras de autores con trayectoria reconocida en el campo de la formación docente y/o problemas sociales educativos, descartando sistemáticamente información procedente de blogs personales, revistas divulgativas sin arbitraje y otras fuentes de dudosa validez científica, que pudieran comprometer la integridad analítica del estudio.

La investigación se desarrolló en cuatro etapas secuenciales pero interrelacionadas dialécticamente: primero, la formulación de preguntas hermenéuticas orientadoras sobre las claves materiales, éticas y epistemológicas que condicionan la formación docente; segundo, la recopilación y categorización preliminar de documentos académicos relevantes; tercero, el análisis interpretativo profundo mediante ciclos hermenéuticos que permitieron, como señala Barrero Espinosa (2011): “Comprender e interpretar las acciones de los agentes educativos frente a los paradigmas que tradicionalmente se han mantenido implícitos en el campo de la metodología de la investigación” (p, 104) ; y cuarto, la construcción crítica de interrelaciones teórico-prácticas entre las condiciones sociales identificadas y sus implicaciones para los procesos de enseñanza-aprendizaje, estableciendo vínculos conceptuales que permitieran visualizar alternativas transformadoras para la formación del docente contemporánea.

Los criterios hermenéuticos adoptados para interpretar las fuentes seleccionadas se estructuraron en torno al principio del círculo hermenéutico de Gadamer (2004), donde el movimiento interpretativo constantemente osciló entre la comprensión de las partes (fragmentos textuales específicos) y el todo (contexto global socioeducativo). Como destaca Stewart (2025), este proceso iterativo posibilita una comprensión más profunda de los datos, ya que cada ciclo de análisis arroja nueva luz tanto sobre las partes como sobre el todo. En consecuencia, esta interpretación priorizó la detección de significados implícitos en los discursos sobre formación docente, desentrañando los supuestos epistemológicos que sostienen las relaciones de poder entre actores educativos y evidenciando cómo ciertos silencios textuales revelan exclusiones sistemáticas de voces docentes en la construcción de políticas formativas, lo que permitió comprender, las huellas discursivas que naturalizan problemáticas sociales como ajenas al quehacer pedagógico.

Conviene reconocer que, las limitaciones metodológicas de esta investigación hermenéutico-documental suponen el riesgo de sesgo interpretativo inherente a todo análisis cualitativo, donde la subjetividad del equipo investigador puede condicionar la lectura de los textos analizados. Como señala Medina (2023), un desafío significativo radica en la ausencia de una cultura reflexiva que permita la comprensión del sentido de las tareas que realizan los actores educativos, lo cual aplica tanto a docentes como a investigadores educativos.

Adicionalmente, la naturaleza contextuada de los problemas sociales dificulta la transferibilidad de hallazgos entre distintas realidades socioeducativas, la sobreabundancia de textos académicos impide la exhaustividad absoluta, y la distancia entre discursos teóricos y prácticas formativas concretas, genera interrogantes sobre la aplicabilidad inmediata de las conclusiones, exigiendo futuros estudios que complementen la aproximación documental con métodos etnográficos en espacios reales de formación docente.

Claves para la formación del docente de escuela básica ante los problemas sociales del siglo XXI. Modelos pedagógicos y propuestas políticas

En términos de lo que significa las claves o las condiciones materiales que inciden en los procesos de enseñanza aprendizaje de la escuela básica en el mundo actual, las fuentes consultadas revelan que la infraestructura escolar emerge como factor determinante en la formación docente. Estudios del Banco de desarrollo de America Latina y el Caribe (2016), evidencian que el 38% de las escuelas en América Latina carecen de servicios básicos como agua potable o electricidad, limitando la implementación de modelos pedagógicos innovadores. La precariedad obliga a los docentes a desarrollar habilidades adaptativas, como improvisar lecciones sin recursos tecnológicos o gestionar aulas superpobladas. En Ecuador, el 67% de los profesores reportan que la falta de laboratorios científicos obstaculiza la enseñanza de metodologías indagatorias, relegando el aprendizaje a la memorización (Bedacarratx & Serón, S/D).

CUADRO 2. Claves materiales

Claves materiales	Impacto en la formación docente
Infraestructura deficiente.	Limita prácticas pedagógicas experimentales.
Brecha digital intergeneracional.	Exige capacitación tecnológica emergente.
Desigualdad socioeconómica.	Obliga a adaptar currículos a contextos locales de precariedad.

Fuente: Elaborado por los autores (2025).

Aunado a lo anterior, la brecha digital constituye otra barrera material crítica. Investigaciones en Ecuador, por ejemplo, demuestran que solo el 23% de los docentes rurales dominan plataformas educativas digitales, frente al 68% en zonas urbanas (López, 2018). Sin ninguna duda, la disparidad genera una doble exclusión: los maestros no solo deben superar su propia formación tecnológica limitada, sino también mediar el acceso desigual de los estudiantes. El Plan Nacional de Infraestructura Educativa de Perú (2017) identifica esta problemática, proponiendo centros tecnológicos comunitarios como estrategia para reducir la asimetría digital (Ministerio de Educación, 2017).

Los autores de esta investigación están convencidos de que, la ética docente contemporánea exige superar el paradigma de neutralidad para asumir un compromiso con la justicia social. En este sentido, Vaillant (2022) argumenta que el 42% de los programas de formación en América Latina omiten contenidos sobre derechos humanos, perpetuando indiferencia ante problemáticas como la xenofobia o la violencia de género, entre otras. El vacío ético se traduce en aulas donde se naturalizan las exclusiones, en lugar de cuestionarlas críticamente.

CUADRO 3. Claves éticas

Dimensiones éticas	Manifestaciones prácticas
Compromiso con la justicia social.	Inclusión de perspectivas marginadas en el currículo.
Coraje cívico del maestro.	Enseñanza de historias locales contrahegemónicas.
Responsabilidad ecológica.	Integración de la crisis climática en proyectos escolares de investigación acción, participación.

Fuente: Elaborado por los autores con base a las reflexiones proporcionadas por Verkhovod *et al.*, (2024).

En sociedades autoritarias con déficit en términos de goce y disfrute general de los derechos humanos, muy comunes en el Sur Global, los docentes evitan discutir conflictos políticos actuales por temor a las represalias institucionales. En consecuencia, las prácticas y discursos de la autocensura contradicen los principios de la pedagogía freiriana (2008), que concibe al aula como espacio de debate democrático y libre. Ante estas realidades, la ética profesional exige formar maestros capaces de guiar discusiones incómodas sobre desigualdades estructurales, incluso cuando esto desafíe intereses de grupos hegemónicos.

En cuanto a las claves epistemológicas, la epistemología dominante en la formación docente aún privilegia conocimientos eurocéntricos, ignorando saberes ancestrales (De Sousa Santos, 2006). Díaz (2025) demuestra que el 73% de los planes de estudio latinoamericanos omiten filosofías indígenas sobre educación comunitaria, reproduciendo en cada momento el colonialismo cognitivo. Esta situación de subordinación epistémica limita la capacidad de los maestros para diseñar pedagogías culturalmente relevantes en contextos indígenas o afrodescendientes.

Cuadro 4. Claves epistemológicas

Modelo pedagógico	Vinculación política
Pedagogía del oprimido.	Promueve reformas estructurales radicales.
Enfoque de las capacidades humanas.	Impulsa políticas inclusivas graduales.
Constructivismo crítico.	Cuestiona la mercantilización educativa en general.

Fuente: Elaborado por los autores con base a los aportes de (Nussbaum, 2016; Oleksenko et al., 2023).

De Sousa Santos (2010), propone superar esta limitación mediante una “epistemología del Sur”, donde el conocimiento se construye colectivamente desde las luchas sociales, de ahí, la puesta en marcha de unos docentes formados en diálogo interepistémico, capaces de articular múltiples sistemas de conocimiento en igualdad de condiciones. En Ucrania, la realidad no es muy diferente a la latinoamericana, tal como sostienen Kryvylova et al., (2022), la escuela básica en Ucrania durante el siglo XX funcionó como un campo de batalla ideológica y cultural, donde se libraron tensiones entre la preservación de la identidad nacional y las políticas de asimilación soviéticas. Pero en cualquier escenario social las dinámicas históricas subrayan que las escuelas no solo transmiten conocimientos, sino que son dispositivos para contener o catalizar transformaciones sociales, un legado que, en el caso ucraniano, hoy persiste en los esfuerzos por reconstruir el sistema educativo tras la invasión rusa de 2022, combinando innovación tecnológica con la reivindicación de una pedagogía arraigada en la memoria nacional de un país que no se rinde.

CONCLUSIONES

En todos los países y más allá de sus particularidades, los docentes de escuela básica requieren desarrollar una ética situada que combine el análisis crítico de las desigualdades sociales estructurales con estrategias pedagógicas contextualizadas. Esta cuestión implica habilidades para reconocer las intersecciones entre clase, género y etnia en sus aulas, así como una epistemología que cuestione la producción hegemónica del conocimiento. Por estas razones la formación docente debe superar la reproducción acrítica de saberes, fomentando en su lugar una “conciencia histórica” que vincule los contenidos curriculares con las luchas sociales locales. Por ejemplo, en comunidades indígenas,

esto se traduce en integrar cosmovisiones ancestrales mientras se deconstruyen narrativas coloniales presentes en los libros de texto.

Hay que comprender más allá de las modas académicas e intelectuales que los modelos pedagógicos son, fundamentalmente, herramientas de intervención social. En consecuencia, modelos como la pedagogía social del oprimido transforman el aula en un espacio de trabajo comunitario, donde problemas como la contaminación o la violencia se abordan mediante proyectos colaborativos. Algunas experiencias concretas así lo demuestran. En Colombia, docentes han implementado los llamados “laboratorios de paz en territorios de violencia” donde los estudiantes analizan el conflicto armado mediante *cartografías participativas*, desarrollando simultáneamente competencias argumentativas y empatía histórica con las víctimas (Barreto, 2016). Estas experiencias demuestran que la pedagogía puede ser un dispositivo de memoria colectiva y reparación simbólica, especialmente en contextos de posconflicto.

Ante la pregunta legítima ¿Cómo pueden las políticas educativas articularse con prácticas pedagógicas emancipadoras para crear sistemas que contribuyan efectivamente a la justicia social? Desde la perspectiva de los autores de esta investigación, la articulación entre políticas educativas y prácticas emancipadoras debe institucionalizar mecanismos de democracia deliberativa que permitan a los docentes influir en las reformas curriculares de la educación.

El caso de Uruguay es ilustrativo: desde 2017, su ley de educación incluye asambleas docentes-estudiantiles para rediseñar contenidos sobre diversidad sexual y derechos reproductivos (Campaña Latinoamericana por el Derecho a la Educación, 2019). Se trata de promulgar un modelo pedagógico que evita la imposición vertical de programas, reconociendo que las soluciones a problemas como el bullying homofóbico requieren la co-construcción de protocolos entre actores locales. Además, exige reorientar los presupuestos hacia la formación en justicia restaurativa y mediación intercultural, entre otros aspectos, que varían de una realidad social a otra.

Definitivamente, la pretendida neutralidad educativa se revela como un mito al analizar cómo los currículos omiten sistemáticamente las resistencias populares o glorifican el extractivismo. En Chile, por ejemplo, el movimiento estudiantil ha denunciado que el 78% de los textos de historia minimizan las violaciones de derechos humanos durante la dictadura (García, 2010). Ante esta realidad persistente, se recomienda crear observatorios ciudadanos que auditen los contenidos educativos, garantizando la inclusión de perspectivas críticas sobre temas como el ecocidio o la precarización laboral. Y es que, solo así la escuela podrá formar sujetos capaces de interpelar las estructuras de poder que perpetúan las desigualdades sociales.

Las preguntas planteadas sobre que modelos pedagógicos y por qué usarlo, surgen, en principio, de la necesidad de reconocer que toda práctica educativa encarna, en esencia y existencia, proyectos civilizatorios en pugna. Cuando un docente en Brasil elige trabajar con la filosofía de Paulo Freire en lugar de autores eurocéntricos, o cuando en España se prioriza el análisis de los desahucios sobre la teoría neoclásica del mercado, se están tomando posturas políticas ante conflictos sociales irresueltos. Por estas y otras razones, la neutralidad educativa solo beneficia al statu quo. Y, por ello, la formación docente debe incluir el estudio de casos paradigmáticos donde la educación ha sido instrumentalizada para la dominación (como las escuelas residenciales para indígenas en Canadá) o contraejemplos de pedagogías insurgentes (como las escuelas zapatistas) (Obredor, 2021). Esta historicización permite comprender que educar es, siempre, un acto de posicionamiento político, ideológico y social ante el mundo del que se es parte.

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ARTÍCULO DE INVESTIGACIÓN

Bienestar psicológico en estudiantes: Adaptación cultural y revisión del modelo Ryff

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Resumen. Este estudio presenta una evaluación psicométrica de la escala de Bienestar Psicológico (PWB) de Ryff para estudiantes internacionales chinos en Malasia. Con una muestra de 335 participantes, implementamos un enfoque analítico integral que incorpora análisis de Rasch, análisis factorial confirmatorio (AFC) y análisis factorial exploratorio (AFE) para evaluar y refinar la estructura de la escala. El modelado inicial de Rasch en una muestra piloto (N = 110) identificó ítems problemáticos que exhibieron desajuste de medición. Al aplicar el AFC para probar el modelo original de seis factores en el estudio principal, descubrimos altas correlaciones interfactoriales y una validez discriminante inadecuada, particularmente entre cuatro dimensiones. A través de la reespecificación y validación del modelo, desarrollamos una solución de tres factores más parsimoniosa que consolidó el Dominio Ambiental, el Crecimiento Personal, el Propósito en la Vida y la Autoaceptación en un constructo unificado, manteniendo la Autonomía y las Relaciones Positivas como factores distintos. El modelo optimizado de 15 ítems y tres factores demostró excelentes propiedades psicométricas ($\chi^2/gl = 1,305$, CFI = 0,995, TLI = 0,994, SRMR = 0,022, RMSEA = 0,030). Estos hallazgos sugieren que el bienestar psicológico podría manifestarse de forma más integrada entre los estudiantes internacionales chinos que se adaptan a entornos interculturales de lo que se teorizó originalmente. Este modelo perfeccionado ofrece a investigadores y profesionales un instrumento más adecuado desde el punto de vista cul-

tural y psicométrico para evaluar el bienestar psicológico en poblaciones de estudiantes internacionales, a la vez que contribuye a nuestra comprensión de cómo el contexto cultural puede influir en la manifestación estructural de los constructos psicológicos.

Palabras clave: modelo de bienestar de Ryff, estudiantes internacionales chinos, psicometría, bienestar psicológico, autoaceptación.

Psychological well-being in students: Cultural adaptation and revision of the Ryff model

Abstract. This study presents a psychometric evaluation of Ryff's Psychological Well-Being (PWB) scale for Chinese international students from mainland China studying in Malaysia. With a sample of 335 participants, we implemented a comprehensive analytical approach incorporating Rasch analysis, confirmatory factor analysis (CFA), and exploratory factor analysis (EFA) to assess and refine the scale's structure. Initial Rasch modeling in a pilot sample ($N = 110$) identified problematic items that exhibited measurement misfit. When applying CFA to test the original six-factor model in the main study, we discovered high inter-factor correlations and inadequate discriminant validity, particularly among four dimensions. Through model respecification and validation, we developed a more parsimonious three-factor solution that consolidated Environmental Mastery, Personal Growth, Purpose in Life, and Self-Acceptance into a unified construct while retaining Autonomy and Positive Relations as distinct factors. The optimized 15-item, three-factor model demonstrated excellent psychometric properties ($\chi^2/df = 1.305$, CFI = 0.995, TLI = 0.994, SRMR = 0.022, RMSEA = 0.030). These findings suggest that psychological well-being may manifest in a more integrated manner among Chinese international students from mainland China adapting to cross-cultural environments than originally theorized. This refined model offers researchers and practitioners a more culturally appropriate and psychometrically sound instrument for assessing psychological well-being in international student populations, while contributing to our understanding of how cultural context may influence the structural manifestation of psychological constructs.

Key words: Ryff Well-being model, Chinese International Students, psychometric property, psychological well-being, Self-acceptance.

INTRODUCTION

The concept of happiness has deep philosophical origins, dating back to ancient Greek thinkers (Bremner, 2011). Two major philosophical traditions—hedonism and eudaimonia—have significantly influenced current views on well-being (Deci & Ryan, 2008). Hedonism, associated with Epicurus, centers on maximizing pleasure and minimizing pain, whereas Aristotle's notion of eudaimonia highlights the importance of living a virtuous life filled with purpose and meaning (Ryan & Deci, 2001; Waterman, 2008). These foundational ideas continue to shape modern psychological perspectives on well-being and life satisfaction. However, the models that try to explain individual well-being are often overloaded with components and don't always have a clear mechanism for the formation of a person's subjective well-being (Voitenko, 2022).

Malaysia has emerged as a prominent destination for international students, with a significant increase in Chinese students enrolling in tertiary-level education. The well-established educational collaboration between China and Malaysia has fostered confidence among Chinese families regarding Malaysia's higher education opportunities as reliable and credible choices (Rui & Wahab, 2022). This significant growth warrants an examination of the factors driving the increasing preference of Chinese students for Malaysia as a higher education destination. Malaysia has emerged as a prominent educational hub in Asia, attracting an increasing number of Chinese students for higher education (Shafaei et al., 2016). According to official statistics, in 2016, approximately 15,000 students from mainland China selected Malaysia as their study destination, making them the second-largest group among international students. Notably, this figure has shown consistent growth over the years (Malaysian Ministry of Higher Education, 2015).

On the other hand, Chinese international students in Malaysia frequently encounter challenges such as adjusting to a new environment, meeting academic demands, and managing cultural conflicts, all of which may adversely impact their psychological well-being (e.g., Gustems-Carnicer et al., 2019; Gan & Yuen, 2019). Given the cultural and cognitive differences among populations, researchers have noted that individuals from distinct countries may perceive and interpret questionnaire items in varying ways. As a result, the psychometric attributes of such instruments, including their factor structure, validity, and reliability, may differ across diverse sample groups and cultural contexts (Vandenberg & Lance, 2000). Therefore, assessing the applicability and validity of the PWBS within the cultural framework of Chinese students studying in Malaysia is essential.

The Psychological Well-Being (PWB) scale, originally developed within a Western cultural context, may not accurately capture well-being in non-Western populations without adequate validation. When applied across culturally distinct settings, such instruments risk measurement bias, even when translated or adapted (Byrne, 2001). Thus, rigorous psychometric evaluation is necessary to ensure their reliability and validity in diverse cultural contexts. The present study seeks to examine the psychometric properties of Ryff's PWB scale among Chinese international students in Malaysia. Employing both classical test theory and item response theory, the research explores the scale's factor structure and assesses its measurement invariance in a cross-cultural framework. Findings are anticipated to contribute to the literature on cross-cultural validation and provide practical guidance for researchers and practitioners working with international student populations.

LITERATURE REVIEW

Conceptual Development of Psychological Well-being

Psychological well-being encompasses a comprehensive view of human flourishing that goes beyond simply experiencing pleasure or avoiding negative emotions (Keyes, 2002). Lasting well-being does not depend on constant positive feelings; rather, it involves the ability to effectively regulate and cope with negative emotions, which is essential for maintaining mental health over time (Huppert, 2009). This form of well-being is marked by a positive psychological state characterized by confidence in facing difficulties, optimistic thinking, persistence in pursuing goals, flexibility, and resilience in the face of challenges (Luthans et al., 2007). According to Ryff (1989), happiness is the highest expression of psychological well-being and a deeply personal experience.

Influenced by various strands of positive psychology—such as Maslow’s idea of self-actualization, Rogers’ concept of the fully functioning person (1968), and Allport’s view of maturity (1961)—Jahoda (1958) proposed a set of criteria for positive mental health that moved beyond merely defining well-being as the absence of illness, offering instead a richer framework for understanding psychological health (Keyes, 2002). Another theoretical perspective on psychological well-being stems from lifespan developmental psychology, which focuses on the unique psychological challenges encountered at different stages of life. This includes Erikson’s (1959) psychosocial stage theory and Neugarten’s (1973) insights into personality changes throughout adulthood and aging. Jung (2001) further contributed to this view, describing individuation as the process through which individuals attain self-realization.

Ryff (1989) argued that although earlier views on well-being were somewhat fragmented, they could be integrated into a more unified conceptual model. A closer look at various definitions of happiness reveals that many theorists focus on common themes related to positive psychological functioning. Drawing from an extensive review of literature, Ryff developed the Psychological Well-Being Scale (PWBS), grounded in research from mental health, clinical psychology, and lifespan developmental theories (Burns & Machin, 2009). Later, Ryff and Keyes (1995) identified six core dimensions that define positive mental health: self-acceptance, positive social relationships, autonomy, mastery over one’s environment, a sense of purpose, and ongoing personal growth. This multidimensional framework presents psychological well-being not simply as the absence of psychological disorders, but as the presence of strengths and positive development in various areas of life.

Although Ryff’s Psychological Well-Being Scale (PWBS) has been widely utilized across various populations (Abbott et al., 2006; Springer et al., 2006; Huta & Waterman, 2014), evidence supporting its factorial validity remains scarce—especially in cross-cultural settings where the scale is applied outside its original context (Byrne, 2001). The structure of psychological well-being has sparked ongoing debate, with factor analyses yielding results that range from two to fifteen factors (e.g., Burns & Machin, 2009).

Factorial Validity of Cross-Cultural Adaptations of the PWB

The Psychological Well-Being (PWB) scales, developed by Ryff in 1989 and revised in 2002, are widely used to assess general psychological well-being across six dimensions: personal growth, environmental mastery, purpose in life, autonomy, positive relations with others, and self-acceptance. The original instrument consists of 120 items rated on a 6-point Likert scale, with higher scores indicating greater well-being. Several shortened versions have been developed, including 84-item, 54-item, 42-item, 39-item, and 18-item versions (e.g., Abbott et al., 2006; Van Dierendonck, 2004).

The factor structure of the PWB scale has been extensively debated in the literature. Research employing factor analysis has produced remarkably diverse results, identifying between 2 and 15 distinct dimensions (e.g., Kafka & Kozma, 2002; Burns & Machin, 2009; Sirigatti et al., 2009). This wide range of factorial solutions highlights the complexity of operationalizing psychological well-being across different populations and contexts.

Ryff and Keyes (1995) found that the 18-item version showed strong correlations (70% to 89%) with the original 120-item version and supported a six-factor model with a second-order general well-being factor. While the original validation demonstrated high internal consistency ($\alpha = 0.86\text{--}0.93$), it also revealed concerns regarding discriminant validity due to significant inter-correla-

tions among certain dimensions ($r = 0.32\text{--}0.76$), especially between self-acceptance, environmental mastery, personal growth, and purpose in life. Similarly, Clarke et al. (2001) identified an acceptable six-factor solution in their research with elderly Canadian participants. Though their analysis did not reveal problematic inter-item correlations, they did note weak factor loadings for several items, suggesting potential measurement issues within the scale's structure. A consistent finding across multiple studies is the presence of high inter-correlations between certain dimensions. Van Dierendonck (2004) reported inter-factor correlations ranging from 0.32 to 0.76, with particularly strong associations between self-acceptance, environmental mastery, personal growth, and purpose in life. This pattern raises important questions about whether these theoretically distinct constructs are empirically separable.

In addition, Lindfors et al. (2006) found results consistent with Ryff and Keyes' (1995) original work, identifying a six-factor structure with a second-order general well-being factor as the best-fitting model. Notably, they observed a substantial correlation ($r = 0.62$) between self-acceptance and environmental mastery dimensions, further highlighting potential conceptual overlap between certain aspects of the scale. Springer and Hauser (2006), using multiple datasets and versions, consistently reported the highest inter-correlations between environmental mastery and self-acceptance, as well as between purpose in life and self-acceptance. To address these overlaps, a hierarchical model was proposed, comprising three first-order factors: one merging Environmental Mastery, Personal Growth, Purpose in Life, and Self-Acceptance (EGPS); a second representing Autonomy; and a third capturing Positive Relations with Others (Henn et al., 2016). These three factors then loaded onto a single second-order factor reflecting overall psychological well-being—a structure that has been supported in prior studies (Burns & Machin, 2009; Van Dierendonck et al., 2008).

In cross-cultural psychology research, ensuring measurement invariance is crucial to confirm that scales maintain consistent psychological structures across diverse cultural groups (Vandenberg & Lance, 2000). The psychometric properties of the PWB scales have been extensively studied across various cultural contexts, with mixed results. Kafka and Kozma (2001) found 15 distinct factors when analyzing the 120-item version with Canadian university students, with Triadó et al. (2007) reporting similar findings using a Spanish translation of the 54-item version. On the other hand, Kitamura et al. (2004) validated the original six-factor model using the Japanese version of the 84-item scale, although some items did not align with the factor structure proposed by Ryff. Cheng and Chan (2005) developed a culturally adapted 28-item Chinese version that demonstrated acceptable fit for a six-factor model. Although the six-factor model has generally received weak to moderate empirical support across various studies (Burns & Machin, 2009; Fernandes et al., 2010; Van Dierendonck et al., 2008), some research has demonstrated a satisfactory model fit (Abbott et al., 2006; Cheng & Chan, 2005; Clarke et al., 2001; Kállay & Rus, 2014). Nonetheless, Springer and Hauser (2006) and Ryff (2013) argued that, despite these inconsistencies, the six-factor model outperforms competing models.

The 18-item short version's internal consistency, assessed using Cronbach's alpha, was reported as follows for the six dimensions: autonomy (0.72), environmental mastery (0.76), positive relations with others (0.75), purpose in life (0.52), personal growth (0.73), and self-acceptance (0.51). The overall reliability of the scale was reported as 0.71 (Ryff & Keyes, 1995). Pedaprolu et al. (2021) additionally reported Cronbach's alpha coefficients for the PWB scale, with subscale values ranging from 0.39 for "purpose in life" to 0.55 for "self-acceptance" and an overall reliability of 0.75.

The 18-item short version of the PWB scale has been extensively utilized in diverse research contexts, including studies involving medical students (Nemati et al., 2023), university students in

Iran (Sefidi & Farzad, 2012), the general population in Italy (Ruini et al., 2003), research scientists in India (Pedaprolu et al., 2021), and clinical nurses in Taiwan (Lee et al., 2019). The scale is widely recognized in the literature for its utility and effectiveness in large-scale surveys, cross-cultural studies, and a variety of applied research contexts (Ryff & Keyes, 1995).

However, its applicability has not been examined among Chinese international postgraduate students in Malaysian universities, where cultural and cognitive variations may influence the perception and interpretation of questionnaire items. Examining the psychometric properties of the PWB scale in this population is particularly significant as Chinese international students face unique challenges navigating between their heritage culture and Malaysian cultural norms (Popadiuk & Arthur, 2004; Alavi & Mansor, 2011), potentially influencing how psychological well-being manifests and is expressed. These students often experience acculturative stress (e.g., Burris et al., 2010; Bewick et al., 2010), language barriers (e.g., Dongqi et al., 2020), and changes in social support systems that may impact their psychological well-being in ways distinct from previously studied populations. Understanding the factorial structure of psychological well-being in this context could inform more culturally sensitive support services in international education settings. Additionally, as China continues to be one of the largest sources of international students globally ((Malaysian Ministry of Higher Education, 2015), research addressing the psychological measurement needs of this population has broad implications for educational institutions worldwide. Building on these insights, the present study seeks to assess the six-dimensional structure of the PWBS scale among Chinese postgraduate students in Malaysia universities and evaluate the reliability and accuracy of the PWBS-C scale in measuring psychological well-being within this specific cultural context.

METHODOLOGY

Content Validity

Content validity refers to the extent to which the items in a given questionnaire accurately capture and represent the constructs being measured (Polit & Beck, 2006). It is closely linked to construct validity, as the process requires an initial definition of the content domain followed by an evaluation of whether the measurement scale appropriately represents that domain (Gould, 1994). According to Polit and Beck (2006), content validity relies on the scope of the measure, ensuring that the instrument includes a sufficient and representative set of items reflecting the underlying concept. Mohajan (2017) emphasizes that content validity ensures all critical aspects and dimensions of the concept under investigation are addressed. Typically, this form of validity is assessed by experts who determine whether the instrument's questions or items adequately cover the intended concept (Bannigan & Watson, 2009). In the present study, two experts from the Faculty of Education at UTM will evaluate the questionnaire's content validity prior to the formal study. Both experts possess extensive experience in teaching psychology and conducting research in the field of social science.

Two educational psychology experts evaluated the questionnaire, verifying its construct validity and suggesting minor wording refinements to enhance clarity. Following translation into Chinese, linguistic specialists conducted additional validation to ensure both measurement accuracy and cultural relevance. The instrument utilizes a seven-point Likert format, recognized for optimal psychometric properties and consistent with the original PWB structure. Content validity assess-

ment employed the Content Validation Index (CVI), with both experts rating all items as content valid (scores of 3-4), yielding a perfect CVI of 1.0 that substantially exceeds the 0.8 threshold required for adequate content validity.

TABLE 1. CVI for Adapted PWB

Measurement scale	Total number	Expert 1			Expert 2			Overall CVI
		Valid items	Invalid items	CVI	Valid items	Invalid items	CVI	
Adapted PWB	16	16	0	1	16	0	1	1

Pilot Study

The pilot study employed Theory (IRT), the Rasch model, to evaluate the psychometric properties of the instrument (Wright& Masters, 1982). This approach converts ordinal data into interval-scale measurements expressed in logits, allowing for more precise assessment of item functioning and producing comparable measurements with defined units (Sondergeld & Johnson, 2014; Boone et al., 2011). Additionally, the Rasch model enables the removal of irrelevant items, identifies items with high accuracy, and detects potential item bias (Cooke & Michie, 1997). ConQuest version 2 software was utilized for the Rasch analysis due to its powerful capabilities in handling a wide range of measurement models and its ability to process both dichotomous and polytomous item responses efficiently. The software provides comprehensive item fit statistics and allows for clear interpretation of results through well-structured output formats. ConQuest is particularly effective for educational and psychological measurement applications, making it suitable for analyzing instruments such as the one examined in this study (Koyuncu& Şata, 2023).

Data from 110 Chinese postgraduate students at Universiti Teknologi Malaysia were analyzed using ConQuest version 2. This sample size aligns with established guidelines for polytomous Rasch models, which recommend approximately 100-200 participants to achieve stable item parameter estimates due to the increased complexity of item scoring with multiple response categories (Briggs& Wilson, M. (2003). The sample size of 110 participants was determined to be sufficient for obtaining meaningful results in this pilot phase while maintaining adequate statistical power.

To evaluate item fit, Mean Square (MNSQ) values were examined, with acceptable ranges between 0.6 and 1.4 (Bond & Fox, 2007), and T statistics, with values between ± 2.0 indicating acceptable fit (Linacre, 1994). These criteria help identify items that may not be functioning as expected within the measurement model. Item 3 was removed from the final scale due to statistical misfit based on Rasch analysis (See Table 2). The item demonstrated significant deviation from the measurement model expectations with weighted MNSQ of 1.23 and a T value of 2.2, exceeding the recommended threshold of ± 2.0 . This elevated T statistic indicates the item exhibited more unpredictable response patterns than the model predicts, suggesting it may be measuring a different construct or contains confusing wording that introduces construct-irrelevant variance. Removal of this item improves the overall psychometric integrity of the scale while maintaining sufficient content coverage of the underlying construct.

TABLE 2. Item Parameter Estimates of PWB

PWB		Unweighted Fit				Weighted Fit		
Item	Estimate	error	MNSQ	CI	T	MNSQ	CI	T
1	-0.064	0.07	0.92	(0.73, 1.27)	-0.6	0.9	(0.74, 1.26)	-0.8
2	0.013	0.069	1.01	(0.73, 1.27)	0.1	1.01	(0.74, 1.26)	0.1
3	-0.212	0.041	1.27	(0.73, 1.27)	1.9	1.23	(0.81, 1.19)	2.2
4	0.197	0.077	1.21	(0.74, 1.26)	1.5	1.17	(0.73, 1.27)	1.2
5	0.051*	0.098	1.15	(0.74, 1.26)	1.1	1.17	(0.74, 1.26)	1.2
6	-0.139	0.058	1.16	(0.74, 1.26)	1.2	1.12	(0.74, 1.26)	0.9
7	0.291	0.043	0.94	(0.74, 1.26)	-0.4	0.94	(0.80, 1.20)	-0.6
8	-0.368	0.077	0.76	(0.74, 1.26)	-1.9	0.77	(0.73, 1.27)	-1.8
9	0.171*	0.109	0.96	(0.74, 1.26)	-0.2	0.95	(0.73, 1.27)	-0.3
10	-0.079*	0.059	1.03	(0.74, 1.26)	0.3	1.01	(0.76, 1.24)	0.1
11	0.271	0.066	0.79	(0.74, 1.26)	-1.6	0.86	(0.71, 1.29)	-1
12	0.089	0.064	1.03	(0.74, 1.26)	0.3	1.06	(0.72, 1.28)	0.5
13	0.053	0.06	1.16	(0.74, 1.26)	1.1	1.16	(0.74, 1.26)	1.1
14	-0.360*	0.092	1.16	(0.74, 1.26)	1.2	1.2	(0.72, 1.28)	1.4
15	0.24	0.074	1.2	(0.74, 1.26)	1.5	1.15	(0.74, 1.26)	1.1
16	0.086*	0.084	1.01	(0.74, 1.26)	0.1	1.03	(0.71, 1.29)	0.3
17	0.1	0.076	0.95	(0.74, 1.26)	-0.3	0.96	(0.73, 1.27)	-0.2
18	-0.340*	0.106	0.92	(0.74, 1.26)	-0.6	0.97	(0.74, 1.26)	-0.2

The analysis of the 18-item instrument revealed that most items demonstrated acceptable fit to the Rasch model, with one item (Item 3) showing potential misfit with a weighted MNSQ of 1.23 and a T value of 2.2, exceeding the recommended threshold. As the purpose of the pilot was to refine the instrument, this item was removed to improve the overall measurement properties of the scale before proceeding to the main study.

Participants and procedure

The main study sampled 335 Chinese international postgraduate students from a Malaysian university, exceeding the minimum required sample size (160) based on the 1:10 item-to-sample ratio for SEM. From 366 initial questionnaires, 31 were eliminated through systematic outlier detection using Mahalanobis distance analysis ($p < .001$) (Mahalanobis, 2018; Hair, 2011), standard de-

viation review, boxplot visualization, and screening for straight-lining patterns (Reuning& Plutzer, 2020). Data collection followed formal institutional protocols with official authorization from the Faculty of Educational Sciences and Technology, adhered to methodological guidelines (Sng et al., 2016), and maintained ethical standards including informed consent and participant rights protection (Felzmann, 2009). All participants provided informed consent voluntarily and were fully aware of their involvement in the research process (Felzmann, 2009; Ederio et al., 2023). The consent form ensured participants’ rights to withdraw at any point, guaranteed complete anonymity for privacy protection, and mitigated the risk of deception (Sil & Das, 2017).

Data Analysis Procedure

Mplus software was selected for this analysis due to its effectiveness in handling categorical data through the integration of the WLSMV estimator (Harrington, 2009). As the instruments in this study utilized a seven-point Likert scale—an ordinal measurement format—factor analysis was conducted using Mplus version 8 with the WLSMV estimation approach. Therefore, Mplus 8 (v1.6.1) is employed for confirmatory factor analysis (CFA) testing the models, and SmartPLS 4 (v4.1.0.9) is to test the inner model fit: evaluating reliability, convergent validity, and discriminant validity of the adapted PWB.

Findings

Goodness-of-fit for measurement model

Multiple fit indices were examined to evaluate model adequacy. The Standardized Root Mean Square Residual (SRMR), an absolute fit index, was assessed with values between 0.05-0.10 considered acceptable and values below 0.05 indicating good fit (Schermelleh-Engel et al., 2003). For incremental fit measures, the Comparative Fit Index (CFI) values exceeding 0.95 represent good fit, while values above 0.90 are deemed acceptable (Byrne, 2013; Hair et al., 2019). Similarly, the Tucker-Lewis Index (TLI), a non-normed fit index, values greater than 0.90 indicate good fit (Whittaker & Schumacker, 2022). Additionally, the Root Mean Square Error of Approximation (RMSEA) values below 0.08 and normed chi-square (χ^2/df) between 1.0-5.0 are considered satisfactory thresholds for model evaluation (Hair et al., 2011).

TABLE 3. Goodness-of-fit for measurement model PWB

Model	χ^2	df	χ^2/df	P-Value	CFI	TLI	SRMR	RMSEA			
								Estimate	90 Percent C.I.	Probability RMSEA <= .05	
M1	628.655	119	5.283	0.0000	0.870	0.852	0.067	0.146	0.135 0.157	0.000	
M2	132.684	104	1.276	0.0303	0.993	0.990	0.021	0.037	0.012 0.055	0.879	
M3	139.848	116	1.206	0.0652	0.994	0.993	0.022	0.032	0.000 0.050	0.952	
M4	113.545	87	1.305	0.0296	0.995	0.994	0.022	0.030	0.010 0.045	0.990	

The analysis began with an evaluation of Ryff's original six-factor Psychological Well-Being (PWB) scale. Through rigorous Confirmatory Factor Analysis (CFA), the structural validity of the model was examined. The results demonstrated exceptional model fit, with highly favorable overall fit indices: Root Mean Square Error of Approximation (RMSEA) of 0.037 (90% Confidence Interval [0.012, 0.055]), Comparative Fit Index (CFI) of 0.993, Tucker-Lewis Index (TLI) of 0.990, and Standardized Root Mean Square Residual (SRMR) of 0.021. These metrics provide strong empirical support for the six-factor structure, indicating that the model effectively represents the underlying psychological construct of well-being.

Nevertheless, further examination revealed significant discriminant validity concerns. The Heterotrait-Monotrait ratio (HTMT) analysis showed extremely high correlations between Environmental Mastery (EM), Personal Growth (PG), Purpose in Life (PL), and Self-Acceptance (SA), with HTMT values approaching or exceeding 1.0 (ranging from 0.999 to 1.009) (Sarstedt et al., 2021). Such high values indicate these four dimensions are statistically almost indistinguishable, despite their conceptual differences.

Addressing persistent discriminant validity challenges highlighted in previous research and the current investigation, an alternative three-factor model was proposed. This model combined four highly correlated dimensions—Environmental Mastery (EM), Personal Growth (PG), Purpose in Life (PL), and Self-Acceptance (SA)—into a single composite factor labeled as *Merged Four*, while maintaining Autonomy (AU) and Positive Relations (PR) as distinct factors.

As a result, M3(merged) shows comparable excellence with a slightly better χ^2/df ratio of 1.206 ($\chi^2 = 139.848$, $df = 116$), non-significant p-value (0.0652), marginally higher incremental indices (CFI = 0.994, TLI = 0.993), and slightly improved residual indices (SRMR = 0.022, RMSEA = 0.032, 90% CI [0.000-0.050], probability RMSEA $\leq .05 = 0.952$) than M2. While M3(merged) demonstrates slight statistical advantages across several indices, particularly in its non-significant p-value and higher probability of close fit, the differences between the models are minor, suggesting that both adequately represent the underlying structure of the data.

Construct reliability and validity

To ensure methodological rigor in our measurement models, a comprehensive approach was implemented to evaluate convergent validity and reliability, following the established guidelines of Hair et al. (2019). The assessment centered on four critical statistical parameters: 1) item factor loadings, 2) Cronbach's alpha, 3) composite reliability, and 4) average variance extracted (AVE). Stringent criteria were applied throughout the validation process. Specifically, factor loadings were required to exceed 0.60 to establish item validity (Hair et al., 2019). Internal consistency was rigorously examined through both Cronbach's alpha and composite reliability, with threshold values set above 0.70 to confirm satisfactory reliability (Fornell & Larcker, 1981; Hair et al., 2019). Additionally, AVE was incorporated as a complementary validity indicator, with values of at least 0.50 considered sufficient to demonstrate convergent validity, in accordance with Hair et al. (2019). To address potential statistical complications, variance inflation factor (VIF) values were also scrutinized. VIF values below 5 were deemed to represent acceptable multicollinearity levels, while values exceeding 10 indicated significant multicollinearity issues (Hair et al., 2019; Becker et al., 2015).

TABLE 4. Construct reliability and validity and collinearity (VIF)

PWB	Items	Outer Loading	Cronbach's alpha	Composite Reliability	AVE	VIF
	Autonomy		0.912	0.944	0.85	
	AU1	0.920				2.902
	AU2	0.921				3.268
	AU3	0.925				3.439
	Merged Four		0.978	0.980	0.817	
	SA1	0.907				4.629
	SA2	0.907				4.662
	SA3	0.902				4.479
	EM1	0.892				4.031
	EM2	0.913				5.125
	EM3	0.898				4.213
	PG1	0.920				5.493
	PG2	0.904				4.522
	PG3	0.904				4.589
	PL2	0.904				4.650
	PL3	0.892				4.062
	Personal relationship		0.926	0.953	0.871	
	PR1	0.938				4.161
	PR2	0.931				3.834
	PR3	0.931				3.365

Despite the strong overall performance of the three-factor model (M3), minor multicollinearity issues persisted for items EM2 (VIF = 5.125) and PG1 (VIF = 5.403) (Hair et al., 2019; Becker et al., 2015) (see Table 4). Consequently, these items were removed to improve model fit, resulting in the refined M4 model. The fit indices for M4 indicate excellent structural validity: $\chi^2 = 113.545$ with 87 degrees of freedom ($\chi^2/df = 1.305$), CFI = 0.995, TLI = 0.994, SRMR = 0.022, and RMSEA = 0.030 (90% CI [0.010, 0.045]). The probability of RMSEA ≤ 0.05 is notably high at 0.990, suggesting strong model fit.

In addition, the psychometric assessment of the three-factor Psychological Well-Being (PWB) scale demonstrates excellent measurement properties across all dimensions. The Autonomy factor (three items: AU1-AU3) exhibits high outer loadings (0.920-0.925), strong reliability (Cronbach's alpha = 0.912, composite reliability = 0.944), robust convergent validity (AVE = 0.85), and acceptable multicollinearity levels (VIF = 2.902-3.439). Similarly, the Personal Relationship factor (three items: PR1-PR3) shows very high loadings (0.931-0.938), excellent reliability (Cronbach's alpha = 0.926, composite reliability = 0.953), strong convergent validity (AVE = 0.871), and acceptable multicollinearity (VIF = 3.365-4.161). The Merged Four factor, consolidating items from Self-Acceptance, Environmental Mastery, Personal Growth, and Purpose in Life dimensions, demonstrates consistently high loadings (0.892-0.920), outstanding reliability (Cronbach's alpha = 0.978, composite reliability = 0.980), and robust convergent validity (AVE = 0.817).

Comparative analysis between M3 and M4 reveals subtle improvements in the refined model. While both demonstrate strong fit statistics, M4 shows marginally better performance across key indicators, including lower RMSEA (0.030 vs. 0.032), higher CFI (0.995 vs. 0.994), and higher TLI (0.994 vs. 0.993). The most notable improvement appears in the probability value of RMSEA ≤ 0.05 (0.990 vs. 0.952), indicating M4's stronger confidence of good fit. Additionally, M4's more parsimonious structure is reflected in its reduced degrees of freedom (87 vs. 116), suggesting a more efficient measurement model while maintaining excellent psychometric properties.

Discriminant validity

Discriminant validity refers to the extent to which constructs in a measurement model are empirically distinct from one another (Fornell & Larcker, 1981). It is a critical methodological requirement for accurately analyzing relationships among latent variables (Hair et al., 2019). According to established criteria, discriminant validity is confirmed only when a latent construct explains more variance in its own indicators than it shares with other constructs within the model (Hair et al., 2019).

In this study, discriminant validity was assessed using multiple complementary approaches. First, the Heterotrait-Monotrait Ratio (HTMT) of correlations was employed, which is considered a more reliable criterion than the traditional Fornell-Larcker method (see Table. 5). Based on Henseler et al.'s (2015) guidelines, HTMT values below 0.85 indicate strong discriminant validity, while values below 0.90 are deemed acceptable. Second, the Fornell-Larcker criterion was applied, which requires that the square root of the average variance extracted (AVE) for each construct should exceed its correlation with any other construct in the model (Haji-Othman & Yusuff, 2022). Finally, the cross-loadings of all indicators across constructs were examined to verify that each indicator loaded highest on its intended construct with substantially lower loadings on all other constructs (Henseler et al., 2015), confirming that items were appropriately assigned to their respective latent variables (Chin, 1998). The results from all three approaches consistently demonstrated adequate discriminant validity among the study's constructs.

The initial HTMT assessment of the proposed three-factor psychological well-being model (M3)—in which the four related dimensions of Environmental Mastery, Personal Growth, Purpose in Life, and Self-Acceptance were consolidated into a single “Merged four” construct—indicated acceptable though borderline discriminant validity between certain constructs. Most notably, the HTMT coefficient between Autonomy (AU) and the Merged four reached 0.879, approaching the upper acceptable limit of 0.90. Other relationships demonstrated more comfortable values: 0.591 between AU and Positive Relations (PR), and 0.721 between PR and Merged four. Though these findings generally supported acceptable discriminant validity, the relatively high AU–Merged four correlation suggested possible theoretical overlap between these constructs, indicating the need for additional model refinement to strengthen construct distinctiveness.

HTMT analysis of the refined M4 model demonstrated notable improvements in discriminant validity measures: the AU–Merged four coefficient reduced considerably from 0.879 to 0.779, the PR–Merged four value decreased from 0.721 to 0.691, and the AU–PR relationship improved slightly from 0.591 to 0.574. The most significant enhancement occurred in the previously problematic AU–Merged four relationship, which shifted from borderline acceptable to comfortably within the recommended threshold (below 0.85), providing strong evidence of improved construct separation and theoretical distinctiveness.

The observed improvements—evidenced by reductions in HTMT ratios and enhanced model fit indices—offer strong support for the refined three-factor model (M4) as a more statistically sound and conceptually parsimonious representation of psychological well-being. Table 5 provides a comparative overview of HTMT coefficients before and after item removal (M3 vs. M4), where values outside parentheses correspond to the refined model (M4), and those within parentheses reflect the original estimates from M3. Following the exclusion of two items with VIF values slightly exceeding 5, both the HTMT analysis and model fit metrics demonstrated marked enhancement. These results collectively validate the item removal as a judicious and efficient refinement of the measurement model.

TABLE 5. HTMT Results for PWB

	HTMT Results		
	AU	PR	Merged four
AU			
PR	0.574 (0.591)		
Merged four	0.779 (0.879)	0.691(0.721)	

The Fornell-Larcker section confirms this with square roots of AVE (diagonal values: AU=0.922, PR=0.933, Merged four=0.903) exceeding inter-construct correlations in their respective rows and columns ((Fornell & Larcker, 1981). The Fornell-Larcker criterion results for the three-factor Psychological Well-Being (PWB) model demonstrate strong discriminant validity among the constructs (see Table 6). Each construct has stronger correlations with its own indicators than with those of other constructs, indicating that it shares more variance with its associated measures than with unrelated ones in the model. Specifically, the correlation between AU and PR is 0.544, between AU and Merged four is 0.734, and between PR and Merged four is 0.685. The highest correlation (0.734 between AU and Merged four) remains below the square root of AVE for both constructs, further supporting discriminant validity. These findings provide statistical evidence that the three PWB dimensions are empirically distinct from one another, despite their conceptual relationships, reinforcing the structural validity of the three-factor model.

TABLE 6. Fornell-Lacker Criterion for PWB

Fornell- Lacker Criterion		
AU	PR	Merged four
0.922		
0.544	0.933	
0.734	0.685	0.903

As shown in Table 6, the cross-loading matrix confirms that each item predominantly loads on its theoretically assigned factor. Items measuring Autonomy exhibit high loadings on their intended construct (0.920–0.925), with only moderate cross-loadings on unrelated factors. Positive Relations

items similarly show strong primary loadings (0.931–0.938), while the indicators from the merged dimensions—Environmental Mastery, Personal Growth, Purpose in Life, and Self-Acceptance—demonstrate consistently substantial loadings (0.894–0.907) on the combined “*Merged four*” factor. These results collectively affirm that the revised 15-item, three-factor model successfully addresses the discriminant validity limitations of both the original six-factor structure and the earlier 17-item three-factor model, while retaining solid psychometric robustness.

TABLE 7. Cross loading for PWB

	AU	PR	merged 4
AU1	0.920	0.502	0.728
AU1	0.920	0.502	0.728
AU2	0.921	0.509	0.642
AU2	0.921	0.509	0.642
AU3	0.925	0.494	0.655
AU3	0.925	0.494	0.655
EM1	0.652	0.637	0.894
EM1	0.652	0.637	0.894
EM3	0.661	0.599	0.899
EM3	0.661	0.599	0.899
PG2	0.656	0.609	0.907
PG2	0.656	0.609	0.907
PG3	0.662	0.627	0.906
PG3	0.662	0.627	0.906
PL2	0.659	0.623	0.906
PL2	0.659	0.623	0.906
PL3	0.664	0.594	0.896
PL3	0.664	0.594	0.896
PR1	0.517	0.938	0.632
PR1	0.517	0.938	0.632
PR2	0.476	0.931	0.608
PR2	0.476	0.931	0.608
PR3	0.528	0.931	0.676
PR3	0.528	0.931	0.676
SA1	0.666	0.614	0.905
SA1	0.666	0.614	0.905
SA2	0.667	0.634	0.907
SA2	0.667	0.634	0.907
SA3	0.673	0.628	0.906
SA3	0.673	0.628	0.906

DISCUSSION

This study provides important insights into the psychometric properties of the Psychological Well-Being (PWB) scale when applied to Chinese international students studying in Malaysia. Our findings raise significant questions about the empirical distinctiveness of Ryff's theoretical six-factor structure, particularly in light of the substantial overlap observed between certain dimensions when used with this specific cross-cultural population.

The high inter-factor correlations revealed through our HTMT analysis between Environmental Mastery, Personal Growth, Purpose in Life, and Self-Acceptance (with values approaching or exceeding 1.0) suggest these dimensions are statistically nearly indistinguishable in our sample of Chinese international students, despite their conceptual differences. This finding aligns with previous research that has questioned the distinctiveness of these dimensions. Van Dierendonck (2004) similarly reported high inter-factor correlations, particularly among these same four dimensions. While Clarke et al. (2001) and Lindfors et al. (2006) found support for the six-factor structure, they too observed substantial correlations between certain dimensions, notably Self-Acceptance and Environmental Mastery.

It is important to note that the original six-factor structure still demonstrated acceptable model fit indices in our study, confirming the overall value and validity of Ryff's theoretical framework. The six-factor conceptualization offers rich theoretical insights into the multidimensional nature of psychological well-being and has proven useful across numerous studies and diverse populations. Our findings do not invalidate this model but rather suggest that in the specific context of Chinese international students navigating cross-cultural adaptation in Malaysia, certain dimensions may be experienced in a more integrated manner.

The methodological approach employed in this study represents a significant strength. Beginning with Rasch analysis in the pilot phase allowed for early identification of problematic items (Frances & Solon, 2014), such as PL1, which demonstrated substantial misfit with the measurement model. It should be noted that our Rasch analysis was conducted using the original dimensional structure and focused primarily on item parameter estimation. The limited sample size in our pilot study ($n=110$) was insufficient for robust DIF analysis, which typically requires larger groups for meaningful comparisons across cultural or demographic categories. This integration of Item Response Theory with traditional factor analytic techniques provided a more comprehensive assessment of the scale's psychometric properties than either approach alone could offer.

CONCLUSION

This study presents a rigorous psychometric assessment of the Psychological Well-Being (PWB) scale through the integration of multiple analytical frameworks. In the preliminary pilot phase, Rasch analysis grounded in Item Response Theory (IRT) was employed to detect measurement anomalies. The exclusion of item PL1 was warranted due to its substantial misfit with the model (weighted MNSQ = 1.23, $T = 2.2$), suggesting that its response pattern was misaligned with the intended latent construct. The application of Rasch analysis at this early stage facilitated the detection of item-level irregularities that may not have been identifiable using traditional classical test theory alone. This Rasch-informed refinement laid a more psychometrically robust foundation for the subsequent main analysis.

The main study commenced with a traditional six-factor confirmatory factor analysis (CFA), which produced fit indices that, while within acceptable ranges, indicated less-than-optimal model performance and raised concerns regarding its structural validity. A closer inspection highlighted substantial issues with discriminant validity. Specifically, the Heterotrait-Monotrait (HTMT) ratio analysis revealed exceedingly high inter-factor correlations among Environmental Mastery (EM), Personal Growth (PG), Purpose in Life (PL), and Self-Acceptance (SA). These elevated values suggest that, despite their theoretical distinctiveness, the four dimensions were statistically indistinguishable within the measurement model.

In light of the observed discriminant validity issues, a revised three-factor model was proposed wherein the highly interrelated dimensions—Environmental Mastery, Personal Growth, Purpose in Life, and Self-Acceptance—were consolidated into a single latent construct labeled “Merged four,” while Autonomy and Positive Relations were retained as separate factors. This restructured model (M3) yielded improved psychometric properties and model fit. Further refinement involved the removal of two items (PG1 and EM2) with variance inflation factors exceeding 5.0, culminating in the final model (M4), which comprises 15 items distributed across three latent variables. The optimized model demonstrated excellent fit indices ($\chi^2/df = 1.305$, CFI = 0.995, TLI = 0.994, SRMR = 0.022, RMSEA = 0.030), along with enhanced discriminant validity, as indicated by reduced HTMT values.

Limitations

Several limitations of this study should be acknowledged. The cross-sectional design limits our ability to assess the stability of the factor structure over time (e.g., Levin, 2006), particularly for international students whose psychological well-being may evolve throughout their cross-cultural adaptation process (Zhou et al., 2008). Additionally, our use of convenience sampling means that the findings may not fully represent the broader population of Chinese international students in Malaysia (e.g., Jager et al., 2017). The sample was also drawn from specific universities, potentially limiting the generalizability of our findings.

A methodological limitation of this study is that Rasch analysis was only employed during the pilot phase, whereas the main analyses relied exclusively on Classical Test Theory (CTT) approaches. Although the sample size in the main study ($n = 335$) would have been adequate for conducting Differential Item Functioning (DIF) analysis, the shift to CTT-based methods precluded further examination of measurement invariance across demographic subgroups. This decision was guided by the study’s primary focus on factorial structure but reflects a trade-off between the depth of item-level diagnostics and the broader dimensional validation. Moreover, while the study identified structural inconsistencies in the PWB scale within this population, it did not investigate the underlying cultural or contextual factors that may account for the limited empirical distinctiveness of certain dimensions among Chinese international students in Malaysia.

Implications and Future Directions

These findings have important implications for how psychological well-being is conceptualized and measured in cross-cultural contexts, particularly for Chinese international students navigating adaptation to a foreign educational environment. Although Ryff’s six dimensions may not demonstrate perfect distinctiveness in this population, with considerable overlap observed among certain aspects, this does not necessarily indicate a flaw in the theoretical framework. Rather, it suggests that

Chinese international students may experience psychological well-being in a more integrated manner than originally conceptualized, with specific components exhibiting stronger interconnections than anticipated in the original model.

The three-factor model identified in this study (Autonomy, Positive Relations, and the “Merged four” composite) may provide a more parsimonious and culturally appropriate framework for assessing psychological well-being among Chinese international students. This streamlined model could offer practitioners and researchers a more efficient tool for assessing well-being in this group. Future research should investigate whether similar patterns of dimensional overlap emerge in different international student populations, which could help determine whether our findings reflect characteristics specific to Chinese international students in Malaysia or more fundamental issues with the scale’s structure in cross-cultural settings. Additionally, longitudinal studies examining how the factor structure might change throughout the cultural adaptation process would provide valuable insights into the dynamic nature of psychological well-being for international students. Future studies could benefit from integrating Rasch modeling, DIF testing, and qualitative approaches to more comprehensively explore how cultural variables shape both the experience and measurement of psychological well-being.

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ARTÍCULO DE INVESTIGACIÓN

Educación para la ciudadanía a través del folclore: valores humanísticos en la cultura oral de Kelantan

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Resumen. El folclore malayo constituye una tradición oral transmitida intergeneracionalmente, proporcionando enseñanzas y valores fundamentales para la formación de los jóvenes. No obstante, su transmisión ha disminuido debido a la escasez de narradores capacitados y a la rápida evolución de los medios de comunicación, lo que ha generado su percepción como irrelevante entre las nuevas generaciones. Este estudio analiza la educación para la ciudadanía a través del folclore, centrándose en los valores humanos presentes en la tradición oral de Kelantan. La investigación se basa en el análisis de seis relatos folclóricos malayos del distrito de Bachok, Kelantan: *Pembunuhan Raja Abdullah*, *Bukit Marak Bukit Keramat*, *Raja Siam Terkena Tuba Bunian*, *Ayam Berkokok di Gunung*, *Perkembangan Ilmu Islam di Kelantan* y *Berpupukakah Gunung Ayam?* Los relatos fueron recopilados mediante una entrevista al Sr. Jusoh, re-

conocido narrador de Kampung Rusa. Se adoptó un enfoque cualitativo, combinando revisión bibliográfica, entrevistas y encuestas para garantizar autenticidad en los datos. Además, se utilizó la herramienta Quizziz para presentar la educación ciudadana a través del folclore. Participaron 75 estudiantes del curso de Cultura y Civilización Malaya de la Universidad de Malasia Kelantan. Asimismo, el estudio aplica la teoría *Takmilah* con el *Prinsip Khalayak*, fomentando la formación hacia el *insan kamil* como modelo educativo. Los resultados confirman que los valores humanos constituyen una guía esencial para la educación ciudadana, reforzando la relevancia del folclore en la vida comunitaria de Bachok, Kelantan.

Palabras clave: folclore malayo, educación para la ciudadanía, valores humanos, Kelantan.

Education for citizenship through folklore: humanistic values in the oral culture of Kelantan

Abstract: Malay folklore represents an oral tradition passed down through generations, providing essential teachings and values for the formation of young individuals. However, its transmission has declined due to a shortage of skilled storytellers and the rapid evolution of communication media, leading to its perception as irrelevant among younger generations. This study examines citizenship education through folklore, focusing on the human values present in the oral tradition of Kelantan. The research is based on the analysis of six Malay folktales from the Bachok district of Kelantan: *The Murder of Raja Abdullah*, *Bukit Marak Bukit Keramat*, *Raja Siam Affected by Tuba Bunian*, *The Rooster Crows on the Mountain*, *The Development of Islamic Knowledge in Kelantan*, and *Is Gunung Ayam Divided into Tribes?* These stories were collected through an interview with Mr. Jusoh, a renowned storyteller from Kampung Rusa. A qualitative approach was adopted, combining literature review, interviews, and surveys to ensure data authenticity. Additionally, the Quizziz tool was used to present citizenship education through folklore. A total of 75 students from the Malay Culture and Civilization course at the University of Malaysia Kelantan participated in the study. Furthermore, the study applies the *Takmilah* theory with the *Prinsip Khalayak* (Audience Principle), promoting the formation of the *insan kamil* (the perfect human) as an educational model. The results confirm that human values serve as a fundamental guide for citizenship education, reinforcing the relevance of folklore in the community life of Bachok, Kelantan.

Keywords: malay folklore, citizenship education, human values, Kelantan.

INTRODUCTION

Malay Folklore are classic stories passed down orally within communities. The content of these classic tales contains many pieces of advice and guidance as tools for education (Adnan, Yaacob & Mazlan, 2021). The advice in Malay folklore serves as a medium for parents to educate their children on maintaining the customs and manners of the Malay people. Malay customs and etiquette are used as guidelines for parents in shaping their children's character to ensure they do not deviate from what has been set. This statement is supported by Adnan & Yaacob (2022), who define Malay

folklore as character education for improving the morals of children and teenagers. Malay folklore is often shared orally during leisure time, which allows parents and children to spend time together. This, in turn, strengthens the bond between parents and children. As a result, children easily grasp the rules and values conveyed in Malay folklore. According to Hanafiah & Yaacob (2021), Malay folklore are defined as exemplary stories filled with positive values to shape the personalities of young people. Malay folklore is communicated orally to ensure young people fully understand the rules and taboos practiced by their ancestors.

Human values is a form of wise thinking assessed through speech or actions (Mazlan, Yaacob & Abdillah, 2021). In general, human values include a person's knowledge in making the best comparisons to avoid conflicts in the community. This statement is supported by Adnan & Yaacob (2020), who explain that human values is a deep understanding of knowledge. It involves in-depth research and observation conducted by a human. According to Hanafiah, Yaacob, Rashid & Jusoh (2021), human values involve the highest knowledge of community civilization. This is because human values encompasses thorough examination of the knowledge being outlined. Therefore, scientific analysis will be used to substantiate every knowledge acquired.

In conclusion, Malay folklore also has its own human values. The human values is knowledge embedded in Malay folklore has the potential to educate young people. Therefore, this study should be conducted to highlight the essence of the human values possessed by the Malay community in Bachok District, Kelantan. The location in Bachok district, Kelantan, was chosen due to its geographical condition, which has not yet fully developed. The slow pace of development has allowed the traditions of the previous generation to still be preserved by the local community. Thus, this study aims to promote Malay folklore in Bachok district, Kelantan, as an educational medium for human values to young people. This is to ensure that the younger generation learns the cultural practices of the previous generations.

LITERATURE REVIEW

The researcher has reviewed several past studies related to Malay folklore in Malaysia. One of these studies is *Cerminan Nilai-Nilai Islam dalam Koleksi 366 Cerita Rakyat Malaysia: Satu Pendekatan Takmilah* by Hanafiah & Yaacob (2021). Malay Folklore are stories conveyed through the creative ideas of storytellers. These Malay folklore are used to offer advice to the local community through oral traditions. However, with the advancement of technology used by society today, Malay folklore is seen as less relevant for transmission. Therefore, this study was conducted to identify and analyze the reflection of Islamic values in *Koleksi 366 Cerita Rakyat Malaysia*. This study focuses on a text titled *Koleksi 366 Cerita Rakyat di Malaysia*. The study employs literature review and text analysis methods to obtain reliable data. The study also applies the *Takmilah* theory as a data validation tool. As a result, the study finds that Malay folklore has the potential to shape the character development of children and adolescents towards a more positive direction. Additionally, scholarly observation was also conducted by Hanafiah & Yaacob (2021) through the title *Nilai-Nilai Kemanusiaan dalam Cerita Lisan: Satu Penelitian Takmilah*. This study discusses Malay folklore that serve as references to teach humanity about manners and etiquette. The study was conducted to identify and analyze the human values in Malay folklore. This study is limited to a text titled *Koleksi 366 Cerita Rakyat di Malaysia*. Among the selected Malay folklore is *Perahu Bunga Emas, Tukang Besi dan Tukang Kayu, Wak Sino Tukang Gasing, Bawang Putih Bawang Merah Ular dan Gurunya Buluh, Bukit dan Pokok,*

Angsa Berbulu Emas, Bertukar Menjadi Batu, Mengapa Pinggang Kerengga Ramping and Raja Kuyuk. This study employs the methods of literature review and text analysis to demonstrate the concept of human values in Malay folklore. The results indicate that Malay folklore can serve as a source of inspiration as they have the potential to educate young people in developing good character.

In addition, a study was conducted by Yaacob (2022) titled *Nilai Murni dalam Cerita Legenda di Lembangan Sungai Pengkalan Datu, Kelantan*. Malay folklore is defined as literature that highlights the civilization of the local community. This study was conducted to identify and discuss the values found in legendary stories in Pengkalan Datu River Basin, Kelantan. The study focuses on the legendary stories from this particular region. The research utilized literature review and interviews as data collection methods. It also applied the National Philosophy of Education as a sound deductive approach. The results of the study demonstrate that the practices adopted by the Malay community in their daily lives are based on the lessons conveyed through folklore. Moreover, a study titled *Konsep Nilai Islam Dalam Cerita Rakyat Melayu, Daerah Pasir Mas, Kelantan: Kajian Terhadap Prinsip Ketuhanan Yang Bersifat Kamal* by Yaacob, Adnan & Hanafiah (2023). Malay folklore is a form of storytelling passed down orally, rich in positive values. These values serve as examples to educate young people. However, the traditional delivery of Malay folklore is less emphasized today. This is because face-to-face storytelling is considered less relevant for young people due to the modern use of technology. Therefore, this study was conducted to identify and discuss the concept of kindness in Malay folklore, Pasir Mas district, Kelantan. The study focuses on gathering Malay folklore from traditional storytellers in Pasir Mas district, Kelantan. The research uses literature review and fieldwork methods for data collection. It also applies the *Takmilah* theory through the *Prinsip Ketuhanan Yang Bersifat Kamal*. The results of the study show that the concept of kindness in Malay folklore reflects the personality of the Malay community, which upholds decency and good manners.

Additionally, a study titled *The Concept of Kindness Through The Saka Halo Myth: An Application of Kahoot as Education Medium* by Yaacob & Adnan (2023). Malay folklore is a form of entertainment used to educate the personality of the community. Malay folklore are believed to have the ability to shift the mindset of the community towards a more rational and critical approach. Therefore, this study was conducted to identify and discuss the concept of kindness in the Saka Halo story. The study focuses on a single tale uploaded through the kahoot application, specifically *Saka Halo*. The research uses literature review, fieldwork, and surveys. The survey was conducted with 46 students from the University Malaysia Kelantan via the kahoot app. The results show that the concept of kindness in Malay folklore can be identified through the actions of the main character, who possesses a kindness. Ongoing research was also conducted by Adnan & Yaacob (2023) with the title *The Wisdom in Malay folklore*. This study focuses on the concept of Malay folklore as an educational medium that teaches children about Malay civilization. Malay folklore is seen as a valuable cultural heritage from the past. However, the delivery of Malay folklore today is considered irrelevant due to the competition from mass media that highlight educational content in animated forms. This study was conducted to identify and discuss the wisdom in Malay folklore. The study focuses on Malay folklore found in the text *Nilai-Nilai Murni dalam Naratif Lisan di Lembangan Sungai Pengkalan Datu, Kelantan: Satu Penelitian Pengkaedahan Melayu*. The research uses literature review and text analysis to strengthen its findings. The study applied a *Teori Pengkaedahan Melayu* as a sustainable deductive method. The results indicate that Malay folklore helps the Malay community open their minds and evaluate issues wisely.

Next, research was also conducted by Adnan & Yaacob (2023) titled *Akal Budi dalam Cerita Rakyat Interpretasi Sosiobudaya Kanak-Kanak dan Remaja*. Malay folklore are defined as stories that en-

compass human values aimed at educating society to become better. Malay folklore is used to highlight the authority and civility of the Malay community. This study was conducted to identify and discuss wisdom in Malay folklore as a sociocultural concept for children and adolescents. The study is limited to several Malay folklore, such as *Amukan Lembaga Hitam*, *Misteri Penunggu Panau* and *Haji Mahmud Tokoh Agama*. This study uses both literature review and fieldwork methods for data collection. The results show that there are aspects of wisdom such as tolerance, perseverance, and politeness found in the Malay folklore identified. Additionally, a study titled *The Two-Way Relationship of Consolation in Malay Oral Narrative Delivery Values as a Medium of Education: A Case Study at Lembangan Sungai Pengkalan Datu, Kelantan* by Yaacob, Adnan, Husin, Hamdan, Mohamad & Ismail (2024) focuses on the role of Malay folklore as a two-way relationship between the storyteller and the community to help improve each other's character. However, folklore is less emphasized today due to their oral presentation style, which is considered outdated because most people today are busy with daily activities. This study was conducted to identify and discuss the role of Malay folklore as an educational medium. The research is limited to an examination in Malay folklore at Lembangan Sungai Pengkalan Datu, Kelantan. The study uses literature review and fieldwork methods to gather accurate data. The results reveal that Malay folklore can educate a person's character by manipulating the roles of the characters in the story to make them realize their mistakes.

A study was also conducted by Yaacob, Adnan, Hassan, Hasan, Yusuff & Mohamad (2024) titled *Common Sense in Folklore Asal Usul Nama Kelantan: Game-Based Learning Applications in Teaching of Student Perspective using Kahoot*. Malay folklore is seen as a valuable cultural heritage of the Malay community, applied to educate the behavior of young people. This is because Malay folklore carries valuable guidance that can shape the character of youth. This study was conducted to identify and analyze the values in *Asal Usul Nama Kelantan*. This study is limited to *Asal Usul Nama Kelantan*. This Malay folklore is uploaded on the kahoot application as an educational medium for students at University Malaysia Kelantan. The study uses literature review, fieldwork, and surveys. It also applied the *Teori Budaya* inspired by Barker (2009). The findings of this study reveal that Malay folklore helps nurture a learning spirit to build good character when interacting with the surrounding community.

In conclusion, previous studies have examined various aspects of Malay folklore in Malaysia. However, the researcher found that there are still gaps in the philosophical aspect in Malay folklore. Through initial investigations, the researcher observed that previous studies have focused more on Islamic values, wisdom, moral values, and the concept of kindness rather than philosophy. According to (Yaacob, Adnan, Hassan, Hasan, Yusuff, & Mohamad (2024), Malay folklore also contain moral values that can be used as an educational dan teaching value medium. This has resulted in the philosophical content in Malay folklore being less explored and highlighted. Therefore, this study is important to elevate the philosophical aspects of Malay society through the delivery in Malay folklore.

Problem statement

Based on research on past studies, the researcher found that there are gaps in the human values of Malay society through Malay folklore. This is because previous studies only examined aspects of values, common sense and Islamic values compared to looking at the human values of Malay society. Indirectly, the philosophy of Malay society contained in Malay folklore is not developed and is beginning to be marginalized by young people. This is because no one wants to uphold the human values aspects of Malay society. Furthermore, today's era is based on technology and reading books

through e-books is beginning to be introduced. Therefore, the presentation of Malay folklore has become more limited and difficult to convey directly to young people. This makes young people's knowledge of the human values of Malay society less known. Therefore, this study was conducted to provide added value to future studies, especially on the human values aspects in Malay folklore.

Research Methodology

Methodology is the most important element in the procedure for collecting valid data. Therefore, the use of accurate and correct methods can complete the study findings because they coincide with the objectives. For the information collection process, the researcher has used a qualitative design. This qualitative design is divided into the library method, the field method and the questionnaire to obtain accurate and detailed data.

The first method is the library method. The library method refers to a scientific observation to obtain a definition of Malay folklore and human values. This is done to classify each information obtained. This is to avoid duplication in collecting study data. Among the scientific materials examined are books, journals, working papers and internet sources. These scientific materials were obtained at Tun Uda Library, University Malaysia Kelantan Library, Kuala Lumpur Language and Library Department, East Coast Language and Regional Department, University Putra Malaysia Library, Sultan Zainal Abidin University Library, University Malaysia Terengganu Library, University Utara Malaysia Library and Kelantan State Public Library.

Meanwhile, the second method is the field method. The field method involves a method in which the researcher collects data by interviewing the storyteller in the area that has been outlined. The researcher went to the Bachok district, Kelantan to get several comforters to get Malay folklore. The researcher met the head of the district and was recommended by Mr. Jusoh. The researcher met Mr. Jusoh in Kampung Rusa, Bachok, Kelantan. After discussing with the storyteller, the researcher set a date and time that was suitable for Mr. Jusoh. This was to provide a harmonious relationship throughout the interview. The researcher met Mr. Jusoh on March 5, 2020 at exactly 9 am, March 8, 2020 at 11 am and March 12, 2020 at 11 am. The interview session lasted for an hour to two hours. The results of this interview obtained some Malay folklore. Among the folklore stories obtained are the *Pembunuhan Raja Abdullah*, *Bukit Marak Bukit Keramat*, *Raja Siam Terkena Tuba Bunian*, *Ayam Berkokok di Gunung*, *Perkembangan Ilmu Islam di Kelantan* and *Berpuakakah Gunung Ayam?*.

Throughout the interview process, the researcher recorded the process in audio and video. The purpose of this recording was to serve as evidence and reference for the researcher in the future. In addition, the researcher also recorded every conversation that took place throughout the interview. The results of this recording were filtered several times to ensure that every data obtained was not omitted. This is to ensure that every information obtained is accurate and valid.

Data collection was also done through questionnaires. Through the questionnaire method, the researcher used the quizizz application by uploading six short Malay folklore. The researcher took respondents consisting of 75 students from University Malaysia Kelantan. These respondents consisted of students who were taking the Malay Culture and Civilization subject at University Malaysia Kelantan. Through the use of quizizz, the researcher was able to examine the level of understanding of University Malaysia Kelantan students towards the human values of Malay society through the Malay folklore presented.

Theory

Takmilah theory is one of the holistic frameworks proposed by Bakar (1996). This *Takmilah* theory encompasses the concepts of divinity, prophethood and includes Islamic religious knowledge. Knowledge about religion is spread to the community to be lived together. Therefore, the researcher uses one of the *Takmilah* theories, namely the *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil*. The concept shows the continuity of education with religion applied by the local community. This is because the community learns the knowledge of monotheism and faith to improve themselves with goodness. *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* highlights the forms of literary works that honor the majesty of Allah SWT through the actions of his people who wage jihad and oppose acts of shirk. This is clearly to remind fellow human beings about the concept of *Amar Ma'ruf Nahi Munkar*. Understanding this concept makes people feel that they have reached a level of perfection in learning Islamic religious knowledge.

Analysis and study findings

In the analysis section, the researcher found several forms of citizenship education through folklore on human values in the oral culture of Kelantan. Among them are living based on Islam, education to form civilized humans, refinement of character, obedience to the government and always reaching consensus.

Human values is a form of knowledge used to evaluate a truth (Adnan & Yaacob, 2020). Human values is seen as an assessment that is carried out in depth to confirm an act or situation. Aspects of human values are used to discuss matters in detail and supported with clear evidence. This statement is supported by Adnan, Yaacob & Mazlan (2021) who believe that human values is critical thinking followed by details or strong evidence. This proof confirms that every action taken is in accordance with customs and main principles. According to Hanafiah & Yaacob (2021), human values are a form of ethics that is associated with mature and wise thinking. Human values are applied to defend social justice in the community. Justice implemented through noble values can build deep understanding between communities.

Living based on Islam

Living based on Islam is a spiritual element that has been integrated into the beliefs of the Malay community (Adnan & Yaacob). This is because the Malay community has placed great faith in the oneness of Allah SWT. All blessings obtained are gifts from Allah SWT to His faithful people. This statement is supported by Hanafiah & Yaacob (2021) who believe that living based on Islam is a person's desire to obtain perfection from the Divine. Therefore, the actions and conversations of the individual adhere to the religion of Islam. All principles and guidelines taught in Islam will be obeyed voluntarily. The concept of living based on Islam can be seen in the title of the story *Perkembangan Islam in Kelantan*. This concept is explained as in the excerpt below:

Excerpt 1

In the context of the game of *teri* during the era of Islamic influence, the aim was to cure patients through incantation treatment but still hold fast to the obedience of a servant to Allah SWT through the recitation of prayers to cure patients who were affected by the devil's influence.

(Jusoh, personal interview, Mac, 5, 2020)

Based on the above excerpt, the concept of living based on Islam can be seen in the context of the *teri* game. Initially, the *teri* game received Hindu influence which used elements of worship in the ceremony. However, after the arrival of Islam, the *teri* game began to change the concept of worship to the practice of praying. Where every illness was submitted to Allah SWT to be cured. This is because at that time, the Malay community believed that there was no greater power than Allah SWT. At this time, the Malay community began to realize that the practice of worship contradicted the beliefs that had been outlined in the *Quran* and *Hadith*. Application of *Takmilah* theory through the principle of public and work relationship by Bakar (1996). The *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* covers the process of learning religion by a group of people. Malay society learns knowledge to improve the mind and personality so as not to deviate from the religion of Islam. This is because Malay society believes in the concept of heaven and hell. This is where people who do good will get a place in heaven while people who wrong themselves and others will be in hell. Therefore, the act of associating partners with Allah SWT is prohibited in Islam. This is because Allah SWT cannot be equated with His creation.

Education to form civilized humans

Education to form civilized humans is a form of teaching that emphasizes behavior that has high ethics and discipline (Adnan & Yaacob, 2023). This type of education is important for forming a harmonious and respectful society. Indirectly, every complex problem will be solved well involving uncontrolled angry emotions. This statement is supported by Hanafiah, Yaacob, Rashid & Jusoh (2021) who define education to form civilized humans as all forms of teaching carried out by parents to instill good morals in their children. This is to ensure that their children respect the elders in the community. Indirectly, young people are able to avoid conflicts with older members of the community.

The concept of education to form civilized humans can be seen in the title of the story *Pembunuhan Raja Abdullah*. This concept is detailed as in the excerpt below:

Excerpt 2

King Loyor wanted to save his son and arranged an engagement between King Abdullah and Princess Saadong. So, Princess Saadong got engaged to King Abdullah before leaving for Bangkok to follow the King of Siam.

(Jusoh, personal interview, Mac, 5, 2020)

Through the above quote, the concept of education to form a civilized human being can be seen in the character of King Loyor. King Loyor was the father of Princess Saadong. When Princess Saadong was proposed to by the King of Siam, King Loyor acted to arrange his daughter's engagement with King Abdullah. This was seen as a sign of respect for the King of Siam because Princess Saadong did not want to marry him. However, in order to save the face of the King of Siam, the King Loyor asked his nephew to be engaged to Princess Saadong. This was a subtle way of expressing his disagreement with the King of Siam's proposal. Application of *Takmilah* theory through the *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* by Bakar (1996). The principle of audience and work relationship shows a form of literature that teaches people to deepen their understanding of Islam. This is because one of the principles of Islam is mutual respect for each other. This action is to build a humble society regardless of actions or speech. This principle is able to form a civilized and harmonious Malay society. This also highlights the personality of the Malay community who maintain politeness and manners.

Refinement of character

Refinement of character is a form of consideration of the mind by a human being in controlling his desires (Mazlan, Yaacob & Abdillah, 2021). Refinement of character shows a person's kindness when receiving help. This is because humans show their good side more with gentleness in words or actions. This statement is supported by Yaacob (2022) who describes refinement of character as a person's habit of prioritizing good deeds to those around them. This is because the individual also receives the kindness of others directly or indirectly. This character encourages people to spread kindness to each other in their community.

The concept of refinement of character can be seen in the title of the story *Pembunuhan Raja Abdullah*. This concept is explained as in the excerpt below:

Excerpt 3

Then, the seventh Pawang asked the King of Siam to return Princess Saadong to her native country because he was afraid that her illness would worsen. Then, the King of Siam sent the chieftain Ta bar to accompany Princess Saadong back to the Kilatan State. Princess Saadong felt very happy because she was saved from the King of Siam and her country was also at peace without having to be enemies with the State of Bangkok.

(Jusoh, personal interview, Mac, 5, 2020)

Through the above excerpt, the concept of refinement of character can be seen in the character of the King of Siam. Therefore, the King of Siam was pleased with Princess Saadong and proposed to her. However, when Princess Saadong arrived in the state of Siam, the King of Siam received news that Princess Saadong had been engaged. The King of Siam was disappointed and felt betrayed and acted arbitrarily. Due to the actions of the King of Siam, he eventually fell ill with a strange illness for days. The King of Siam called a doctor and was told that Princess Saadong presence brought disaster. To cure the illness, the King of Siam needed to send Princess Saadong back to his state. The King of Siam asked Tok Bar to accompany Princess Saadong back to his state.

Apart from that, the concept of refinement of character can be observed in the title *Raja Siam Terkena Tuba Bunian*. This concept is detailed as in the excerpt below:

Excerpt 4

After getting engaged and the time to leave for Bangkok had arrived, Princess Saadong fulfilled her promise to go to Bangkok after seven days. Princess Saadong was accompanied by the loyal chieftain of the King of Siam, Chieftain Ta Bar, to Bangkok.

(Jusoh, personal interview, Mac, 8, 2020)

Based on the excerpt above, the concept of refinement of character can be seen in the character of Princess Saadong. Princess Saadong is said to have received a proposal visit from the King of Siam. Because she had diplomatic relations with the King of Siam, Princess Saadong did not dare to agree or reject the proposal. Princess Saadong only asked for a week's time to think. Because it would be inappropriate to reject the proposal, Princess Saadong asked her father, Raja Loyor, to agree to be engaged to Raja Abdullah. After the specified period, Princess Saadong fulfilled her promise to go to Siam.

In addition, the concept of refinement of character is also seen in the title of the story *Ayam Berkokok di Gunung*. This concept is explained as in the excerpt below:

Excerpt 5

They had visited the village chief's house to ask for permission to collect forest products on Gunung Ayam. "Chief, we want to collect some herbs on Gunung Ayam because only on that mountain can we get the herbs. We hope that the chief can give us permission because we really need it for our brother who is seriously ill." Asked Harun, one of the three of them.

(Jusoh, personal interview, Mac, 8, 2020)

In the excerpt above, the concept of refinement of character can be seen through the character of Harun. Harun is a villager who intends to go to Gunung Ayam. He is depicted as being very polite when asking for permission from the village chief to go to the mountain that very afternoon. The village chief advises against it, warning Harun not to pursue his plan due to the late hour. However, Harun remains firm in his decision because a family member is gravely ill.

Observations on the concept of refinement of character are explored in the title *Berpuakakah Gunung Ayam*. This concept is explained as in the excerpt below:

Excerpt 6

After Mak Na recovered as usual, Bomoh Embong told her not to do anything while she was at Gunung Ayam because she was worried that the guardian would be angry. Mak Na felt very sorry for her actions and thanked Bomoh Embong for healing her. Mak Na apologized to Pak Abdul for causing trouble to her husband.

(Jusoh, personal interview, Mac, 12, 2020)

Through the above quote, the concept of refinement of character can be seen in the character of Mak Na. Mak Na and her husband went to Gunung Ayam to look for wooden herbs. When they arrived at Gunung Ayam, Mak Na's husband told them not to do anything reckless there. However, Mak Na, who saw a fairly fresh wooden leaf without thinking twice, picked the leaf. Mak Na's actions made her possessed. Mak Na was lucky because her husband realized the strange behavior. Mak Na was taken by her husband to see Bomoh Embong. At Bomoh Embong house, Mak Na was treated. After recovering, Mak Na thanked him for the help. Mak Na promised not to do anything that would harm herself. Application of *Takmilah* theory through the *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* by Bakar (1996). The *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* is seen as a form of knowledge that adheres firmly to the Islamic religion. The Islamic religion educates humans to be more polite, always humble and grateful for the blessings bestowed upon them. Such actions educate humans to maintain polite behavior towards each other. This principle further highlights the beauty of the Islamic religion which glorifies believers and preserves virtues through the production of its works.

Obedience to the government

Obedience to the government is a form of unwavering loyalty to the leader of the organization (Yaacob & Adnan, 2023). Loyalty is demonstrated through the act of following orders without questioning the ethics of the leader. This is because the leader being followed adheres to the true principles of religion. Furthermore, the personality of a kind leader makes his subordinates admire his character. According to Yaacob, Adnan & Hanafiah (2023), obedience to the leader is a person's obedience to the leader because he always treats his subordinates fairly. A fair and steadfast leader

makes his subordinates amazed by his character. Therefore, the leader is made an idol or an example of someone to be followed.

The concept of obedience to the government can be seen in the title of the story *Raja Siam Terkena Tuba Bunian*. This concept is detailed as in the excerpt below:

Excerpt 7

The King of Siam message was addressed to the Princess who was said to be in Bukit Marak. The Princess was known as Puteri Saadong. Puteri Saadong was said to be the daughter of Puteri Buluh Bentung. However, the authenticity of the origin of Puteri Saadong is unknown.

(Jusoh, personal interview, Mac, 8, 2020)

Based on the above excerpt, the concept of obedience to the government can be seen in the character of the King of Siam envoy. The character of this envoy tries to convey the mandate of the King of Siam to propose to Princess Saadong at Bukit Marak. This envoy obediently conveys the order of the King of Siam to Princess Saadong. Although he cannot see Princess Saadong's face, this envoy can see the princess' delicate and beautiful fingers. Therefore, the envoy conveys what he sees to the King of Siam. The application of *Takmilah* theory through the *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kami* by Bakar (1996). The *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* encompasses religious education within literary works. This study highlights Malay literature that educates individuals to be more obedient to the rulers. This is because every command from the ruler is closely related to religion. Therefore, a capable government is able to address issues and problems that arise within an organization.

Always reaching consensus

Always reaching consensus is a discussion carried out together with the community (Yaacob, Adnan, Husin, Hamdan, Mohamad & Ismail, 2024). This discussion is conducted regardless of an individual's rank or status in the organization. The purpose of this discussion is to find solutions to the issues presented. This statement is supported by Yaacob, Adnan, Hassan, Hasan, Yusuff & Mohamad (2024), where consensus involves an open attitude within a group of people to solve problems. Each person tries to respect the stance or opinion of others. The concept of always reaching consensus shows the way of thinking of an individual or group of people who are not prejudiced against one another.

The concept of always reaching consensus can be seen in the story of *Bukit Marak Bukit Keramat*. This concept is elaborated in the following excerpt:

Excerpt 8

One day, the four of them arranged to meet at a *wakaf* in the village. They wanted to discuss their plans to go to Bukit Marak to find herbs. "I heard that Bukit Marak is where the villagers say a lot of things have happened," Yusof asked, looking at his friends' faces for confirmation.

(Jusoh, personal interview, Mac, 12, 2020)

Apart from that, the concept of always reaching consensus can be detailed through the title *Raja Siam Terkena Tuba Bunian*. This concept is explained as in the excerpt below:

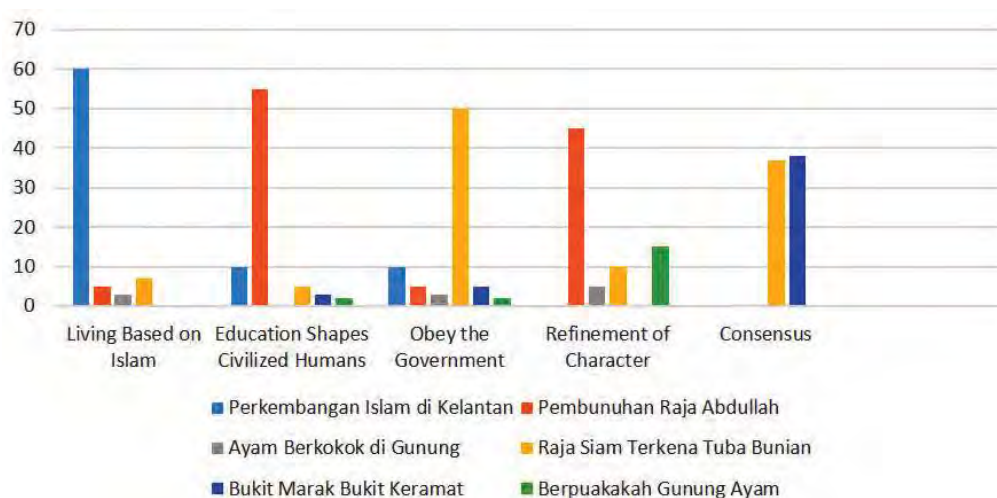
Excerpt 9

When his seven attendants appeared before him, he asked the question that had been on his mind for the past few days. “O my loyal attendants, I feel very anxious about the throne of this state. I do not have a queen. How can I find a candidate for queen for the good of this state, O seven attendants?” asked the King of Siam to his seven attendants.

(Jusoh, personal interview, Mac, 8, 2020)

Through the excerpt above, the concept of always reaching consensus is seen in the character of the Siam King. The Siam King, who did not have a queen, summoned seven royal shamans to seek their opinions on finding a queen. After consulting with each other, the seventh shaman divined a princess who lived on Bukit Marak. The discovery of the princess brought happiness to the Siam King, and he then sent a messenger to propose marriage to her. Application of *Takmilah* theory through the *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* by Bakar (1996). This *Prinsip Khalayak bertujuan memupuk mereka ke arah insan kamil* encourages humans to deepen their knowledge. This is because knowledge can guide humans to be more empathetic between communities. This principle explains the harmony between communities that is obtained when each one tries to give in and not be arrogant. Therefore, the reward for good deeds will be given by Allah SWT.

Figure 1. Students Understanding at University Malaysia Kelantan in Malay Folklore through the Quizizz Application



Based on Figure 1, the students found the human values of life based on Islamic teachings in the story *Perkembangan Islam di Kelantan* with 60 students agreeing, compared to the story *Ayam Berkokok di Gunung* with only three students agreeing. Meanwhile, the human values of education aimed at shaping cultured individuals was agreed upon by 55 students in the story *Pembunuhan Raja Abdullah*, compared to only two students in the story *Berpuakakah Gunung Ayam*. Additionally, the story *Raja Siam Terkena Tuba Bunian* was agreed upon by 50 students regarding the human values of obedience to the ruler, compared to only two students in *Berpuakakah Gunung Ayam*. The story *Pembunuhan Raja Abdullah* also received high approval from University Malaysia Kelantan students, with 45 students agreeing, while only five students agreed with the story *Ayam Berkokok di Gunung*. However, the human values of always being in consensus was equally agreed upon by

students in the story *Bukit Marak Bukit Keramat* with 38 students, while 37 students agreed it was present in *Raja Siam Terkena Tuba Bunian*. This demonstrates that University Malaysia Kelantan students were able to comprehend the essence of the Malay folklore delivered through the quizizz application. This understanding occurred due to several factors, including the use of simple language in the Quizizz application. This allowed students to grasp Malay folklore efficiently. Furthermore, quizizz did not use implied language in delivering Malay folklore. As a result, the use of quizizz effectively exposed students to Malay literature.

CONCLUSION

In conclusion, this study is seen to be able to demonstrate the existence of several human values within Malay society in the folklore Malay of Bachok, Kelantan. These human values have greatly contributed to educating the Malay community to always do good, regardless of one's rank or status. The delivery of human values through Malay folklore teaches the community to be more tolerant of each other. Indirectly, harmonious relationships can be built and maintained with the younger generation. Although Malay folklore is less exposed to young people today, the use of applications such as quizizz should be integrated. This would allow the community to deliver Malay folklore using technology like quizizz. As a result, Malay folklore can be preserved and passed down to the younger generation. According to Yaacob, Adnan, Hassan, Hasan, Yusuff, & Mohamad, (2024), learning through technology can also be used as an important medium to attract the interest of the students who study Malay folklore effectively and fun.

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INTERACCIÓN Y PERSPECTIVA

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Gubernamentalidad educativa y reproducción de subjetividades alternativas. Apuntes para una teoría social crítica de los dispositivos pedagógicos contemporáneos*

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Resumen. Desde sus orígenes en el siglo XX, la teoría crítica de la sociedad, en sus variados escuelas y disciplinas, ha tenido una agenda diversa pero siempre preocupada por el estudio de los factores materiales y simbólicos que oprimen a personas y grupos por igual, proponiendo en el proceso saberes y prácticas de liberación. En el marco de esta tradición gnoseológica, y mediante una metodología hermenéutica analógica, el objetivo de la investigación consiste en discutir, desde el punto de vista del enfoque sociocrítico, la noción de gubernamentalidad educativa en el marco de la reproducción de las subjetividades alternativas y de los dispositivos pedagógicos que intentan disipar, las ideologías hegemónicas en un tiempo y espacio determinado. Al calor de este objetivo se formuló la pregunta ¿Cómo operan los dispositivos pedagógicos emergentes en la construcción de subjetividades que resisten las lógicas dominantes del sistema

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educativo tradicional? Los resultados obtenidos permiten concluir que, los apuntes para una teoría social crítica de los dispositivos pedagógicos contemporáneos deben incluir: un enfoque ético, una perspectiva democrática sustantiva, una visión crítica de la realidad y una dimensión epistemológica para la síntesis de los saberes liberadores.

Palabras clave: gubernamentalidad educativa; pensamiento crítico; subjetividades alternativas; teoría social contemporánea; dispositivos pedagógicos.

Educational governmentality and reproduction of alternative subjectivities. Notes for a critical social theory of contemporary pedagogical devices

Abstract. Since its origins in the twentieth century, the critical theory of society, in its various schools and disciplines, has had a diverse agenda but always concerned with the study of the material and symbolic factors that oppress individuals and groups alike, proposing in the process knowledge and practices of liberation. Within the framework of this gnoseological tradition, and by means of an analogical hermeneutic methodology, the objective of the research is to discuss, from the point of view of the socio-critical approach, the notion of educational governmentality in the framework of the reproduction of alternative subjectivities and of the pedagogical devices that attempt to dissipate hegemonic ideologies in each time and space. In the heat of this objective, the question was formulated: How do the emergent pedagogical devices operate in the construction of subjectivities that resist the dominant logics of the traditional educational system? The results obtained allow us to conclude that the notes for a critical social theory of contemporary pedagogical devices must include: an ethical approach, a substantive democratic perspective, a critical vision of reality and an epistemological dimension for the synthesis of liberating knowledge.

Keywords: educational governmentality, critical thinking, alternative subjectivities, contemporary social theory, pedagogical devices.

INTRODUCCIÓN

El concepto de gubernamentalidad desarrollado por Michel Foucault (1988), permite comprender los mecanismos de poder que regulan la existencia de los seres humanos en las sociedades modernas. Según este conspicuo filósofo francés, la gubernamentalidad constituye un conjunto de técnicas y procedimientos destinados a dirigir la conducta de los individuos. Conviene aclarar que, este tipo de poder no opera únicamente de manera vertical o represiva, sino que transita a través de la subjetividad, configurándose mediante lo que Suárez, define como: “El terreno por el que transita el poder y el lugar desde el que se lo puede resistir” (2020, p. 7). En términos heurísticos, la noción de gubernamentalidad resulta clave para analizar cómo las instituciones modernas han desarrollado mecanismos cada vez más sofisticados para regular la vida humana. De modo que, este marco conceptual permite comprender con cierta precisión las relaciones sociales e históricas producidas por diversos dispositivos de gestión a nivel regional, nacional e individual, trascendiendo el mero ejercicio del poder estatal para abarcar las diversas técnicas que moldean modos de ser y estar en el mundo.

Más concretamente, la gubernamentalidad educativa constituye la aplicación específica de estos mecanismos de regulación y dirección de conductas en el ámbito educativo. En palabras de Langer (2008), en general los dispositivos pedagógicos oficiales se configuran como parte de las sociedades de control o de gerenciamiento, y producen tipos de subjetividad distintas a las configuraciones escolares modernas. Por lo tanto, se puede suponer que en los espacios escolares materiales o virtuales, las prácticas de gobierno escolar no solo reproducen lógicas dominantes, sino que también pueden generar resistencias y subjetividades alternativas.

La teoría contrahegemónica de la gubernamentalidad educativa, opera en la tensión entre los dispositivos de control y las posibilidades de transformación, configurando espacios donde la subjetividad se convierte en terreno de disputa (Foucault, 1988). Así, tal tensión ontológica se evidencia en experiencias educativas alternativas que buscan reconfigurar los modos tradicionales de gobierno escolar y generar nuevas formas de relación pedagógica con potencial emancipatorio tal como lo muestra la tradición de pensamiento para la liberación instaurado por Freire (1970), en su texto *La Educación como Práctica de Libertad*, al que sigue posteriormente *La pedagogía del Oprimido* (Freire, 2008).

En este orden de ideas, el objetivo del presente artículo fue discutir, desde el punto de vista de la teoría social crítica contemporánea, la gubernamentalidad educativa en el marco de la reproducción de las subjetividades alternativas y de los dispositivos pedagógicos que intentan disipar, las ideologías hegemónicas en un tiempo y espacio determinado.

En este sentido, cabe preguntarse entonces en clave filosófica: ¿Cómo operan los dispositivos pedagógicos emergentes en la construcción de subjetividades que resisten las lógicas dominantes del sistema educativo tradicional? ¿De qué manera las prácticas de resistencia de estudiantes y docentes reconfiguran el gobierno de lo escolar en torno a la toma de decisiones y permiten la emergencia de nuevas formas de organización educativa? Y ¿En qué medida estos dispositivos alternativos logran efectivamente adoptar una postura crítica para resignificar el contenido de la educación para el mundo del trabajo y para la formación de ciudadanos libres, constructores autónomos de las relaciones sociales? Estas interrogantes guiaron nuestra exploración teórica sobre la gubernamentalidad educativa y su potencial transformador en contextos educativos contemporáneos, marcados por tensiones entre reproducción de la dominación social y la resistencia.

Desde el punto de vista social, investigar sobre gubernamentalidad educativa y reproducción de subjetividades alternativas resulta relevante en un contexto global donde las políticas de exclusión social, llamadas neoliberales o neoconservadoras han configurado determinados dispositivos pedagógicos que requieren ser cuestionados. Desde el punto de vista de los autores de estas reflexiones, la educación contemporánea no puede pensarse al margen de las transformaciones sociales y las demandas legítimas por mayor participación y democratización de los espacios educativos.

Para Langer (2008), las experiencias de bachilleratos populares en Argentina, por ejemplo, permiten visualizar cómo es posible adoptar una postura crítica de cara a resignificar el contenido de la educación tradicional, convirtiéndose así los procesos de enseñanza-aprendizaje en espacios dialógicos de disputa y construcción colectiva de las realidades educativas. Éticamente, este tipo de investigación contribuye a visibilizar y valorar aquellas prácticas educativas que desafían la reproducción de las relaciones sociales dominantes, proponiendo en cambio la desburocratización de la toma de decisiones, generadora de un vínculo de diálogo en el marco de la enseñanza y el aprendizaje en la era digital (Parlamerica, 2022). Por lo tanto,

la mirada contrahegemónica, que no debe confundirse a priori con el legado del socialismo marxista, enriquece el debate sobre qué tipo de sujetos y sociedades se están formando a través de nuestras prácticas educativas contemporáneas.

Siguiendo las coordenadas de Dancy (1993), desde una perspectiva epistemológica socio-crítica, la investigación sobre gubernamentalidad educativa y de los dispositivos pedagógicos alternativos, permite cuestionar en cada momento los marcos tradicionales de producción de conocimiento hegemónico en el campo educativo. Como señalan Armella y Llomovate (2015), de lo que se trata aquí es de superar visiones reduccionistas que atribuyen tanto a las tecnologías como a los estudiantes, cualidades o “habilidades blandas” de las que, a priori, carecen, proponiendo en cambio un análisis complejo de los modos en que se configuran las subjetividades en los espacios educativos. Estudiar la gubernamentalidad desde la teoría social crítica permite comprender cómo el biopoder, entendido como la regulación de la existencia individual y colectiva (Foucault, 1980), opera en las instituciones educativas para, simultáneamente, identificar las grietas donde emergen formas alternativas de subjetividad y prácticas pedagógicas transformadoras.

El presente artículo de investigación y reflexión se estructura en cuatro secciones principales: en la primera sección, se describe el marco teórico abordando los conceptos de la gubernamentalidad desde la perspectiva foucaultiana y explorando su aplicación específica al campo educativo y las tensiones entre poder y resistencia. Al mismo tiempo, analiza el concepto de dispositivo pedagógico, examinando en el proceso tanto los dispositivos oficiales como aquellos emergentes que buscan reconfigurar el gobierno de lo escolar en torno a la toma de decisiones intersubjetivas. En la segunda, se describe el procedimiento metodológico basado en la lectura hermenéutica de textos y contextos.

En la tercera parte, quizá la más importante por su alcance y significado, se procede a analizar y discutir los resultados obtenidos en torno a la configuración de experiencias concretas de dispositivos pedagógicos alternativos, como los “bachilleratos populares”, que ilustran formas de resistencia y producción de subjetividades distintas a las hegemónicas. Finalmente, se presentan a la consideración del lector las conclusiones y recomendaciones del estudio, orientadas a pensar una propuesta teórica para comprender la gubernamentalidad educativa desde una perspectiva crítica y desde el reconocimiento de las necesidades de los ciudadanos, para crear espacios educativos más democráticos, equitativos y orientados a la formación de sujetos críticos en el contexto contemporáneo.

Marco teórico: Gubernamentalidad educativa y reproducción de subjetividades alternativas

La gubernamentalidad, como concepto desarrollado por Michel Foucault (1980; 1988), se refiere a las técnicas y estrategias utilizadas para gobernar las conductas humanas en diferentes contextos sociales. Según el afamado autor de la microfísica del poder, el gobierno no se limita a la coerción directa (ejercicio del poder político vinculante), sino que opera mediante la regulación interna de los sujetos, moldeando su comportamiento y mente, sus discursos y prácticas desde el interior, tal como sostiene Durán (2013).

En este sentido, la gubernamentalidad incluye prácticas de poder descentralizadas que atraviesan instituciones como la familia, la escuela y el sistema legal, entre otras. Por otro lado, Nikolas Rose (2012), amplía esta noción al analizar “lo social” como una articulación continua de dispositivos de poder que permiten gobernar desde un enfoque relacional. Para Rose, gobernar implica actuar sobre las acciones de los sujetos, reconociendo su capacidad de agencia y ajustándola a los ob-

jetivos del poder. Aunque ambos autores coinciden en que el poder se ejerce mediante mecanismos sutiles y productivos, Rose enfatiza la dimensión histórica del liberalismo como base para entender las prácticas gubernamentales actuales.

En este hilo conductor, Pierre Bourdieu introduce una perspectiva diferente al vincular la gubernamentalidad con la dominación simbólica ejercida por el Estado. Según Bourdieu, el Estado no solo regula mediante coerción física, sino también a través de discursos y prácticas culturales que legitiman su autoridad (Bourdieu, 2009). Esto contrasta con Foucault y Rose, quienes ven el poder como algo más dinámico y relacional. Sin embargo, los tres autores coinciden en que las instituciones educativas desempeñan un papel crucial en la reproducción del poder. Mientras Bourdieu destaca cómo estas instituciones perpetúan estructuras sociales dominantes mediante la imposición simbólica, Foucault y Rose, con sus particularidades, sugieren que también pueden ser espacios donde emergen resistencias y subjetividades alternativas. Estas diferencias y similitudes permiten una comprensión más rica de cómo opera la gubernamentalidad en los contextos educativos del siglo XXI.

Todo indica que, la reproducción de subjetividades alternativas en el ámbito educativo está estrechamente vinculada con los dispositivos pedagógicos asociados a la pedagogía de la liberación. En este contexto ideológico, Paulo Freire, en su *Pedagogía de la autonomía de saberes necesarios para la práctica educativa* (2004), plantea que la educación debe ser un proceso dialógico y crítico que permita a los sujetos reflexionar sobre su realidad y, al mismo tiempo, transformarla.

En oposición a la “pedagogía bancaria” propia del capitalismo liberal, donde los estudiantes son receptores pasivos de conocimiento, Freire propone un modelo en el cual tanto educadores como educandos participan activamente en la creación de saberes emancipatorios. Este discurso busca liberar a los individuos de las estructuras opresivas que limitan su capacidad de acción y pensamiento crítico. Al menos en el plano teórico, los dispositivos pedagógicos-liberadores promueven una horizontalidad en las relaciones humanas, cuestionando las jerarquías tradicionales y fomentando prácticas educativas basadas en el diálogo y la praxis solidaria. ¿Pero, son aplicables estos dispositivos pedagógicos a las realidades digitales de la educación del siglo XXI? Todo indica que sí.

Desde esta perspectiva de análisis, los dispositivos pedagógicos alternativos no solo buscan transformar las relaciones educativas, sino también, y esto es lo más importante, reconfigurar las subjetividades producidas por dichas prácticas. Como señala Foucault (2002), los procesos de subjetivación están profundamente ligados a las formaciones discursivas que operan dentro de las instituciones educativas. En este sentido, los dispositivos pedagógicos pueden ser entendidos como herramientas cognitivas y simbólicas para resistir las ideologías hegemónicas y generar nuevas formas de ser y estar en el mundo. Aunado a estas ideas, la pedagogía de la liberación propone un modelo educativo donde los sujetos recuperan su capacidad crítica para analizar y transformar su entorno social. Lo que implica un rechazo explícito a las estructuras opresivas que perpetúan desigualdades sociales y culturales, sin importar que vengan avaladas por discursos liberales o marxistas.

CUADRO 1. Ideas generales sobre gubernamentalidad y subjetividades alternativas.

Autor	Concepto principal	Semejanzas	Diferencias
Michel Foucault	Gubernamentalidad como regulación interna del sujeto.	Poder descentralizado; mirada relacional; producción y reproducción de subjetividades alternativas.	Enfoque histórico limitado al biopoder.
Nikolas Rose	Gobierno social basado en dispositivos relacionales, objetivos y subjetivos.	Reconocimiento de la agencia; influencia del liberalismo clásico.	Énfasis en lo social como construcción histórica.
Pierre Bourdieu	Dominación simbólica mediante instituciones estatales.	Rol central de las instituciones educativas.	El Poder visto más como imposición simbólica que como relación dinámica.
Paulo Freire	Pedagogía liberadora basada en el diálogo crítico.	Transformación social mediante la educación liberadora.	Rechazo explícito a estructuras jerárquicas y hegemónicas.

Fuente: Elaborado por los autores (2025).

El análisis del Cuadro 1 revela a la perspicacia hermenéutica cómo cada autor contribuye a una comprensión crítica de los dispositivos pedagógicos contemporáneos. Mientras Foucault y Rose destacan el carácter relacional del poder, Freire introduce una dimensión ética del fenómeno al enfatizar en la necesidad social de liberar a los sujetos subalternos mediante prácticas educativas transformadoras. Bourdieu, complementa esta discusión al señalar cómo las instituciones perpetúan desigualdades de toda índole mediante discursos simbólicos. En consecuencia, esta diversidad teórica permite articular una teoría social crítica y al mismo tiempo contrahegemónica que cuestiona las prácticas y discursos tradicionales de saber, ideología y poder.

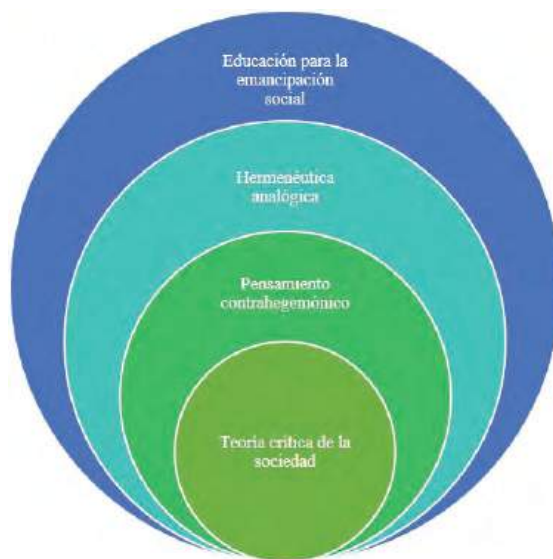
Por estas y otras razones, la teoría social crítica y contrahegemónica se nutre de estas perspectivas para proponer un modelo educativo alternativo basado en la emancipación y el diálogo racional, próximo a la teoría de la acción comunicativa de Habermas (1999). Si se logra reconocer cómo operan los dispositivos pedagógicos hegemónicos, en diferentes contextos históricos y sociales, para reproducir estructuras opresivas, esta teoría puede desarrollar herramientas que permitan resistir dichas dinámicas. Esto incluye prácticas educativas que fomenten el pensamiento crítico, valoren la diversidad cultural y promuevan relaciones horizontales entre educadores y educandos. En última instancia, la aproximación crítica busca transformar no solo las instituciones educativas, sino también las subjetividades producidas por ellas, abriendo espacios para nuevas formas de organización social más inclusivas y democráticas (Stanford Encyclopedia of Philosophy, 2023).

METODOLOGÍA

Esta investigación se sustenta en una concepción epistemológica sociocrítica cercana a la llamada Escuela de Frankfurt, tal como la describe en sus fundamentos epistemológicos la Stanford Encyclopedia of Philosophy (2023), Escuela del pensamiento revisionista que busca articular teoría y praxis para la emancipación humana. Desde esta perspectiva, se asume un compromiso ético con la defensa de los derechos humanos, especialmente en favor de las personas y comunidades vulnerables. De modo que, la metodología está orientada hacia el diseño de dispositivos teóricos y prácticos

que promuevan la contrahegemonía y la liberación integral de los sujetos frente a las estructuras que los oprimen. Este enfoque sociocrítico, basado en el pensamiento crítico latinoamericano (Freire, 2004), intenta visibilizar y transformar las relaciones de poder que perpetúan desigualdades sociales, culturales y educativas, promoviendo un análisis dialéctico de la realidad social.

CUADRO 2. Estructura teórica y metodológica de la investigación.



Fuente: Elaborado por los autores (2025).

Para los efectos particulares de esta investigación, la hermenéutica analógica de Beuchot (2015), se emplea como herramienta metodológica para interpretar los símbolos y signos que configuran la gubernamentalidad educativa y la reproducción de subjetividades alternativas. Este método cualitativo permite conciliar posturas críticas y constructivas mediante una interpretación proporcional y contextual. Según Moreno (2024), la racionalidad analógica facilita el entendimiento de los procesos educativos al integrar las diferencias culturales y sociales con un juicio prudencial que fomente el desarrollo integral del ser humano. En el marco de esta investigación, este método sirve además para revelar cómo los dispositivos pedagógicos pueden ser resignificados hacia una educación liberadora que permita a los sujetos ser y hacer desde su propia agencia.

Por lo demás, la investigación se desarrolló a través de tres (03) etapas o momentos particulares que se explican a continuación de forma sucinta:

1. Fase inicial: Identificación del problema

En esta etapa se realizó una revisión bibliográfica exhaustiva para identificar las problemáticas asociadas a la gubernamentalidad educativa y su impacto en la reproducción de subjetividades alternativas. El objetivo concreto fue delimitar el alcance del estudio y establecer las preguntas clave que guiaron la acción indagatoria. Este proceso incluyó la selección de fuentes académicas relevantes sobre teoría crítica, pedagogía de la liberación y hermenéutica analógica, en inglés y en español.

2. Fase intermedia: Diseño del marco teórico

En este momento de la investigación se desarrolló un marco teórico basado en los principios sociocríticos y en el análisis hermenéutico de los dispositivos pedagógicos. Todo lo cual implicó un trabajo de interpretación profunda para conectar las ideas de autores, ubicados en diferentes tiempos y espacios, como: Foucault, Freire, Bordieu, Rose y Beuchot, entre otros, con las prácticas educativas contemporáneas. Aquí, nuestro propósito fue construir una base conceptual sólida que permitiera analizar los datos recopilados desde una perspectiva crítica, cosa que se logró a todas luces.

3. Fase final: Recopilación e interpretación de la documentación recopilada

En este momento interpretativo se aplicó el círculo hermenéutico para comprender los textos y sus contextos o lugares de enunciación en el mundo, mediante la observación directa de artículos científicos, monografías, tesis y libros. Todo lo cual permitió involucrar a los participantes activos en el proceso de la educación liberadora y en la reproducción de subjetividades alternativas, fomentando su corresponsabilidad en la transformación educativa. Los datos leídos en la dimensión crítica e intertextual fueron interpretados utilizando herramientas hermenéuticas analógicas para identificar patrones simbólicos relacionados con la gubernamentalidad educativa (Beuchot, 2015; Foucault, 1988).

Los autores de esta investigación afirman que esta metodología, más allá de sus limitaciones, permitió identificar cómo operan los dispositivos pedagógicos en la configuración de subjetividades alternativas frente a los discursos hegemónicos. Como se verá en el apartado que sigue, las interpretaciones hermenéuticas revelaron tensiones entre prácticas educativas tradicionales y emergentes, destacando espacios intersubjetivos donde es posible generar resistencias al poder dominante.

Por lo tanto, esta arquitectura metodológica no solo contribuye al entendimiento teórico del fenómeno estudiado, sino que también ofrece herramientas prácticas para diseñar intervenciones educativas orientadas hacia la emancipación social, de ahí su marcado componente crítico y político. En última instancia, se generan aportes para transformar las instituciones educativas en espacios democráticos donde se fomente el pensamiento crítico y se promueva una educación liberadora (Freire, 1970).

ANÁLISIS Y DISCUSIÓN DE RESULTADOS

En todas las experiencias conocidas, la gubernamentalidad educativa, desde una perspectiva crítica contemporánea, opera como un dispositivo de poder y saber que regula las conductas y subjetividades mediante la integración de tecnologías digitales en los procesos pedagógicos, de conformidad con las ideas esbozadas en la segunda mitad del siglo XX por Bordieu (2009), Foucault (1980) y Rose (2012). Ahora, en la era de la digitalización de la vida social se han amplificado las formas en que las instituciones educativas moldean y socializan ideologías hegemónicas, al tiempo que se abren grietas para la emergencia de resistencias multidimensionales.

Por ejemplo, el estudio de la autoría de Aguirre y Pretto (2023), sobre Venezuela, supone que la adopción de políticas de acceso abierto bajo la Ley de Infogobierno refleja un intento estatal por democratizar el conocimiento, pero también evidencia cómo las estructuras tradicionales se adaptan para mantener el control sobre los flujos informativos. Este fenómeno comunicacional y educativo ilustra la tensión entre la promesa emancipadora de las tecnologías y su instrumentalización como herramientas de vigilancia y normalización de la hegemonía.

Precisamente, por estas razones, la teoría crítica permite cuestionar cómo los dispositivos pedagógicos digitales reproducen lógicas neoliberales o socialistas, pero nunca son neutrales ideológicamente, al priorizar competencias técnicas sobre el pensamiento crítico. En otro ejemplo, el análisis de Jacovkis *et al* (2023), realizado en Cataluña sobre plataformas digitales corporativas, muestra cómo estas refuerzan una gobernanza centralizada, desplazando la autonomía docente y estudiantil a un segundo plano. Sin embargo, como señala el estudio venezolano de Aguirre y Pretto (2023), el acceso abierto puede generar espacios de resistencia al permitir la reutilización y modificación de contenidos educativos. Dicha dualidad revela que la gubernamentalidad educativa no es un sistema monolítico, sino más bien un campo epistemológico de disputa donde las subjetividades alternativas emergen desde prácticas contrahegemónicas.

En este hilo conductor, los dispositivos pedagógicos emergentes, como las plataformas de código abierto o los repositorios digitales colaborativos, operan reconfigurando las relaciones de poder y saber en el aula. En el mundo actual, las universidades que adaptaron políticas de acceso abierto para garantizar la circulación de conocimiento permitieron a estudiantes y docentes participar en la producción de contenidos relevantes (Openlab Ecuador, 2024). No obstante, la reflexión analógica sobre la revolución digital advierte que la falta de capacitación docente limita la apropiación crítica de estas herramientas. Por lo tanto, estos dispositivos alternativos, aunque promueven la autonomía, enfrentan barreras estructurales que dificultan su potencial transformador, como la brecha tecnológica o la resistencia institucional a modelos pedagógicos no jerárquicos (Vajiram y Ravi, 2022).

Todas las fuentes interpretadas parecen indicar que, las prácticas de resistencia estudiantil y docente redefinen la toma de decisiones al priorizar la participación colectiva sobre modelos educativos verticales, tal como lo afirmaba Freire, desde (1970). En Ecuador, el modelo de e-gobierno para la gestión educativa buscó simplificar trámites administrativos, pero también generó espacios para que las comunidades exijan transparencia en la asignación de recursos (Openlab Ecuador, 2024). Por su parte, en Cataluña, la adopción de plataformas digitales corporativas enfrentó críticas de activistas que promueven alternativas de software libre, reclamando más soberanía tecnológica (Jacovkis *et al.*, 2023). De cualquier modo, estas “luchas fragmentadas” evidencian que la resistencia no solo cuestiona las herramientas, sino también los marcos ideológicos que sustentan su implementación, desplazando el control hacia modelos más horizontales para ser y aprender.

En este contexto, la capacidad de los dispositivos alternativos para resignificar la educación depende de su articulación con proyectos políticos emancipatorios. El acceso abierto en Venezuela permitió redistribuir conocimiento, pero su impacto en la formación ciudadana crítica fue limitado por la persistencia de currículos tradicionales. En contraste, el estudio catalán muestra que las plataformas digitales, aunque inicialmente cooptadas por intereses corporativos, pueden reconvertirse mediante activismos cívicos que priorizan la ética del común. Para los autores de esta investigación, la clave radica en vincular la innovación tecnológica con las pedagogías críticas que cuestionen las relaciones laborales precarizadas y, simultáneamente, fomenten la construcción de saberes situados (Langer, 2008).

CUADRO 3. Síntesis de argumentos.

Variable	Hallazgo principal	Ejemplo
Digitalización como dispositivo epistemológico	Amplifica el control, pero, al mismo tiempo, habilita resistencias sociales.	Venezuela: acceso abierto vs. adaptación institucional (Aguirre & Pretto, 2023).
Resistencia estudiantil/docente	Prioriza la participación colectiva y la acción democratizadora de los procesos de enseñanza- aprendizaje.	Ecuador: e-gobierno y demandas comunitarias (Openlab Ecuador, 2024).
Brechas digitales estructurales	Limitaciones en capacitación y acceso tecnológico en el sur global.	Estudio del Sur global: el 52.9% de los docentes trabajan sin formación digital (Vajiram y Ravi, 2022).
Cooptación corporativa	Plataformas privadas refuerzan gobernanza centralizada en España.	Cataluña: crítica a Microsoft/Google en educación (Jacovkis et al., 2023).
Resignificación pedagógica	Depende de vinculación entre procesos educativos con proyectos políticos críticos y transformadores de la realidad.	Pedagogía del oprimido como alternativa ética (Freire, 2004).

Fuente: Elaborado por los autores de conformidad con el trabajo hermenéutico de las fuentes citadas en el Cuadro 3 (2025).

Para los autores de estas breves reflexiones, el cuadro 3 evidencia que la digitalización educativa no es neutral: su implementación oscila entre el reforzamiento de estructuras hegemónicas (Gubernamentalidad educativa) y la apertura de fisuras ontológicas para la resistencia y la emergencia de subjetividades alternativas al orden de poder y saber. En este orden de ideas, mientras políticas como el acceso abierto democratizan parcialmente el conocimiento, su efectividad se ve limitada por brechas estructurales (formación docente, infraestructura). Por último, la cooptación corporativa de las industrias del gran capital internacional, como por ejemplo Microsoft y Google, revela cómo el capitalismo neoliberal se adapta para mercantilizar la educación (Nussbaum, 2016), pero también cómo las comunidades pueden reapropiarse críticamente de las herramientas digitales. Por estas razones, la resignificación de los contenidos educativos requiere, por tanto, una articulación explícita entre tecnología, pedagogía crítica y movilización política en la era digital.

CONCLUSIONES Y RECOMENDACIONES

Las conclusiones y recomendaciones presentadas aquí son el resultado de una reflexión personal y del compromiso ético de los investigadores por contribuir a la creación de espacios educativos más democráticos, equitativos y orientados a la dignificación de la persona humana. En un contexto global marcado por tensiones y contradicciones de toda índole, esta propuesta busca responder a las necesidades de convivencia y transformación social mediante una educación que reconozca la dignidad intrínseca de cada individuo. La reflexión parte del reconocimiento de que el orden mundial opera como una totalidad dialéctica, donde los niveles de entropía aumentan cualitativamente, lo que exige un enfoque crítico para enfrentar los desafíos educativos contemporáneos.

Precisamente, en el marco de estas preocupaciones se proponen un conjunto de lineamientos teóricos que funcionan como apuntes, para confeccionar una teoría social crítica de los dispositivos pedagógicos contemporáneos, al mismo tiempo que configura las ideas generales para una propuesta educativa transformadora:

- 1) Enfoque ético: La educación debe ser un espacio para la dignificación humana, promoviendo valores como el respeto, la equidad y la justicia social. Esto implica diseñar prácticas educativas que no solo transmitan conocimientos mecánicamente, sino que también, y esto es lo fundamental, formen ciudadanos críticos capaces de cuestionar estructuras opresivas incluso en esquemas de virtualidad educativa o en espacios caracterizados por el predominio de la inteligencia artificial (Klopov *et al.*, 2023; Verkhovod *et al.*, 2024).
- 2) Perspectiva democrática: Los espacios educativos deben garantizar en cada momento y lugar la participación proactiva de todos los actores involucrados (estudiantes, docentes y comunidad), fomentando el diálogo y la toma de decisiones colectivas. Esta práctica permite construir instituciones educativas más inclusivas y transparentes de conformidad con el desarrollo sostenible de la civilización humana en su conjunto (Nikitenko *et al.*, 2023).
- 3) Visión crítica: Es necesario analizar cómo las prácticas pedagógicas reproducen discursos hegemónicos y, en contraste, buscar alternativas que promuevan subjetividades emancipadoras. En palabras de Habermas (1991), esta idea significa un ejercicio ético que requiere incorporar herramientas teóricas como la gubernamentalidad crítica y, más aún, para identificar las relaciones asimétricas de poder en el ámbito educativo.
- 4) Dimensión epistemológica: La producción y reproducción de conocimiento debe ser participativa y pluralista, integrando saberes locales y globales para enriquecer las prácticas educativas desde una perspectiva contrahegemónica. De lo contrario, el saber se puede transformar en un arma ideológica al servicio de la dominación social de los grupos de poder de una sociedad determinada o de las elites globales (Stiglitz, 2015).

En su conjunto, estos lineamientos buscan transformar las instituciones educativas en espacios materiales y simbólicos donde se fomente, no solo el aprendizaje académico de manera instrumental, sino también la formación integral del ser humano como agente activo de cambio social, creativo y asociativo. En función de estos presupuestos éticos y epistemológicos proponemos, desde ya, un conjunto de líneas de investigación, de franco carácter interdisciplinario que pueden impulsar futuras reflexiones sobre gubernamentalidad educativa y las subjetividades alternativas, tales como:

- Educación y derechos humanos: Un estudio sobre cómo las prácticas educativas pueden promover valores universales en contextos vulnerables.
- Democracia sustantiva en el aula: Análisis de modelos pedagógicos democráticos que permitan a los estudiantes participar activamente en el proceso educativo en los que están inmersos.
- Interseccionalidad educativa: Investigación sobre cómo factores como género, etnicidad y clase social influyen en las dinámicas escolares, vulnerando a ciertas personas y privilegiando a otras.
- Tecnologías críticas: Evaluación del impacto de las tecnologías digitales en la configuración de subjetividades alternativas dentro del sistema educativo.

Sin lugar a duda, estas líneas interdisciplinarias permiten abordar el tema desde múltiples perspectivas teóricas y metodológicas, enriqueciendo el análisis y proponiendo soluciones innovadoras. Por lo demás, creamos también un conjunto de recomendaciones que buscan impulsar espacios educativos transformadores en el siglo XXI, estas recomendaciones abarcan: a) Implementar prácticas pedagógicas basadas en el diálogo crítico entre estudiantes y docentes; b) Diseñar currículos inclusivos que reflejen las necesidades culturales y sociales de las comunidades y no solo ideas foráneas; c) Fomentar programas extracurriculares centrados en valores como la convivencia pacífica y la resolución de conflictos; d) Promover estructuras organizativas horizontales que permitan una mayor participación en la toma de decisiones educativas. En su relación dialéctica, estas recomendaciones buscan superar los efectos biopolíticos de la gubernamentalidad al priorizar modelos educativos centrados en el desarrollo humano integral.

Finalmente conviene reconocer que, entre las posibles limitaciones de esta investigación se encuentra la dificultad para generalizar sus hallazgos debido a la diversidad cultural y social de los contextos educativos analizados. Al mismo tiempo, existe el riesgo de sesgos interpretativos al aplicar herramientas hermenéuticas analógicas, ya que estas dependen del marco conceptual del investigador y nunca están desprovistas de su sistema de creencias. Por último, aunque se ha buscado integrar múltiples perspectivas teóricas, algunas voces críticas podrían considerar insuficiente el enfoque sociocrítico adoptado. Estas limitaciones subrayan la necesidad de continuar explorando el tema con metodologías complementarias y enfoques híbridos que logren articular perspectivas cualitativas y cuantitativas, datos numéricos con fenomenología ¿Pero, es esto epistemológicamente posible o al menos viable?

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ARTÍCULO DE INVESTIGACIÓN

Resiliencia comunitaria y conocimiento situado. Estrategias educativas para la transición socioecológica en el siglo XXI*

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Resumen. El objetivo de esta investigación consiste en debatir filosóficamente el fenómeno de la resiliencia comunitaria y el conocimiento situado, desde el punto de vista propio de la teoría social contemporánea, para imaginar cómo las estrategias educativas pueden impulsarse para el logro de la transición socioecológica en el siglo XXI. Para guiar este objetivo, surgen algunas preguntas transversales, tales como: ¿Cómo se configura la resiliencia comunitaria en contextos de crisis socioecológica y qué papel juega el conocimiento situado en su desarrollo? O ¿De qué manera las experiencias de comunidades en situaciones extremas, como el caso ucraniano, pueden aportar modelos educativos transformadores? De conformidad con la esencia temática, en términos metodológicos se parte de una concepción constructivista y posmoderna del conocimiento situado. Para procesar las fuentes documentales de información se empleó la observación hermenéutica y tres técnicas diferenciadas de lectura. Se concluye que, la creación de una teoría social sobre el tema, aporta saberes para entender científicamen-

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te a la resiliencia como proceso de creación colectiva más que como simple resistencia, lo que ofrece un marco para reconstruir tejidos sociales en zonas de conflicto mediante pedagogías radicalmente contextualizadas que transforman, el trauma social en potencial socioecológico.

Palabras clave: resiliencia comunitaria, conocimiento situado, estrategias educativas, transición socioecológica, teoría social crítica.

Community resilience and situated knowledge. Educational strategies for socioecological transition in the 21st century

Abstract. The objective of this research is to philosophically discuss the phenomenon of community resilience and situated knowledge, from the point of view of contemporary social theory, to imagine how educational strategies can be promoted for the achievement of socioecological transition in the 21st century. To guide this objective, some cross-cutting questions arise, such as: How is community resilience configured in contexts of socioecological crisis and what role does situate knowledge play in its development? Or how can the experiences of communities in extreme situations, such as the Ukrainian case, provide transformative educational models? In accordance with the thematic essence, in methodological terms we start from a constructivist and post-modern conception of situated knowledge. Hermeneutic observation and three different reading techniques were used to process the documentary sources of information. It is concluded that, the creation of a social theory on the subject, provides knowledge to scientifically understand resilience as a process of collective creation rather than as simple resistance, which offers a framework to rebuild social fabrics in conflict zones through radically contextualized pedagogies that transform social trauma into socioecological potential.

Keywords: community resilience, situated knowledge, educational strategies, social-ecological transition, critical social theory.

INTRODUCCIÓN

La presente investigación emerge en un momento histórico caracterizado por múltiples crisis convergentes que desafían los fundamentos epistemológicos y sociales de nuestras sociedades contemporáneas. En este contexto, la articulación entre resiliencia comunitaria y conocimiento situado se presenta como un campo fértil para repensar las estrategias educativas orientadas hacia la transición socioecológica del siglo XXI. De modo que, esta reflexión filosófica busca desentrañar las complejas interacciones entre estos fenómenos, cuestionando tanto las bases teóricas como las implicaciones prácticas de su convergencia en el diseño de respuestas educativas transformadoras.

En las bases epistemológicas de esta investigación, la resiliencia comunitaria constituye un concepto multidimensional que trasciende la sola capacidad de supervivencia ante adversidades, re-configurándose como un proceso dinámico de reconstrucción colectiva que involucra mecanismos intersubjetivos, cognitivos y organizativos propios de las colectividades (Moret-Tatay *et al.*,

2025). Esta perspectiva encuentra su fundamento en la comprensión de que las comunidades no son simplemente agregados de individuos, sino entidades sociales complejas que mantienen relaciones humanas y económicas, compartiendo ideas, valores, costumbres y metas con distintos grados de conformidad y conflicto.

El conocimiento situado, por su parte, emerge como una postura epistemológica crítica que propone hablar de los objetos de estudio evidenciando el lugar desde el cual se parte, reconociendo que ningún conocimiento está desligado de su contexto ni de la subjetividad de quien lo emite (Foucault, 2002). Esta perspectiva desafía las pretensiones de neutralidad del conocimiento científico tradicional, proponiendo una objetividad radical que asume la parcialidad como condición de posibilidad para una comprensión más profunda de la realidad social contemporánea (Moreno Olmedo, 2008).

El objetivo general de la investigación consiste en debatir filosóficamente el fenómeno de la resiliencia comunitaria y el conocimiento situado, desde el punto de vista propio de la teoría social contemporánea, para imaginar cómo las estrategias educativas pueden impulsarse, para el logro de la transición socioecológica en el siglo XXI. La articulación de este objetivo junto con los marcos conceptuales sociocríticos impulsó tres interrogantes fundamentales que atraviesan transversalmente esta investigación:

Primera cuestión: ¿Cómo se manifiesta la resiliencia comunitaria en contextos de crisis socioecológica y cuál es el papel que desempeña el conocimiento situado en la configuración de respuestas adaptativas?

Segunda cuestión: ¿De qué manera las experiencias comunitarias en situaciones de crisis extrema pueden aportar modelos educativos con potencial transformador?

Tercera cuestión: ¿Qué estrategias pedagógicas innovadoras pueden emerger del diálogo entre el conocimiento situado y las necesidades de transición socioecológica global?

Contrariamente a concepciones estáticas que reducen la resiliencia a un rasgo fijo, la investigación contemporánea revela su carácter fundamentalmente dinámico (Neill, 2025). La resiliencia se configura como una característica emergente que resulta de la interacción compleja entre múltiples factores, incluyendo el apoyo social, las características comunitarias, los recursos disponibles y las estrategias organizativas desarrolladas históricamente. Por lo tanto, la comprensión dinámica en clave hermenéutica encuentra particular relevancia en contextos de crisis socioecológica, donde las comunidades enfrentan desafíos que requieren no solo adaptación, sino transformación profunda de sus estructuras y relaciones intersubjetivas.

Siguiendo los aportes de Vanistendael (2004), queda claro que los pilares de la resiliencia comunitaria identificados en la literatura especializada incluyen la autoestima colectiva, entendida como la actitud y sentimiento de orgullo por el lugar en que se vive; la identidad cultural, que implica la persistencia del ser social en su unidad a través de cambios y circunstancias diversas; el humor social, como capacidad de encontrar elementos cómicos en situaciones adversas; y la honestidad estatal, que involucra una conciencia grupal que valora el ejercicio honesto de la función pública. Estos elementos simbólicos constituyen la base sobre la cual las comunidades construyen sus capacidades de respuesta ante situaciones de crisis.

Para abordar estos complejos fenómenos, la perspectiva del conocimiento situado aporta una dimensión epistemológica crucial para comprender los procesos de resiliencia comunitaria. Los co-

nocimientos culturales, contruidos históricamente por los grupos sociales y albergados en la memoria colectiva, proporcionan recursos de entendimiento, orientación ética y sentidos de vida que resultan claves para sustentar procesos de resistencia ante embates y transformación tanto individual como colectiva.

Desde el punto de vista de los autores de esta indagación reflexiva, esta forma de conocimiento se diferencia de otros tipos de saberes por su vinculación directa con el devenir inacabado de la identidad del sujeto y del grupo en su propio contexto, ofreciendo significaciones que emergen desde la experiencia vivida y compartida. En el contexto de crisis socioecológicas, estos conocimientos situados se vuelven especialmente relevantes, ya que proporcionan las herramientas cognitivas y simbólicas necesarias para interpretar, enfrentar y transformar las condiciones adversas (Freyre, 2013).

La convergencia entre resiliencia comunitaria y conocimiento situado abre perspectivas innovadoras para el diseño de estrategias educativas orientadas hacia la transición socioecológica. Las tendencias contemporáneas de la educación ambiental para la sostenibilidad proponen modelos de competencias que integran el cambio climático de manera transversal, incluyendo el fomento de valores cívicos, la incorporación del paradigma de la complejidad, la anticipación prospectiva de escenarios sostenibles y la adopción de discursos y prácticas transformadoras (Lopushniak et al., 2024).

Como se puede apreciar a lo largo de esta investigación, el aprendizaje situado emerge como una metodología particularmente relevante en este contexto, ya que se basa en situaciones reales y concretas, capacitando a los actores sociales para resolver problemas en situaciones cotidianas y asumiendo que el contexto social es un componente clave en la adquisición de habilidades y competencias. De modo que, esta aproximación pedagógica reconoce que el aprendizaje es inherentemente social y contextual, desarrollándose en función de la cultura y enriqueciéndose mediante prácticas colaborativas.

In the context of war, social support plays a crucial role in shaping individuals' emotional experiences. On one hand, receiving support from their community can lead to increased positive emotions, facilitated by a sense of solidarity. This aligns with our findings regarding significant others in the study. Moreover, surviving dangerous situations can also evoke positive emotions. However, it is important to acknowledge that the variable of negative affect has not been controlled for in the present study, representing a significant limitation. (Moret-Tatay et al., 2025, p. 28)

La resiliencia comunitaria se concibe como la capacidad colectiva para hacer frente a adversidades, superarlas y transformarse positivamente a través de ellas. No se trata simplemente de resistir, sino de un proceso activo que involucra la convergencia de grandes atributos y capacidades, tales como: la resistencia, superación, compasión y el poder transformador de la palabra como medio de persuasión (Samán et al., 2022). Por lo que significa, este concepto trasciende la dimensión individual para abarcar las capacidades colectivas de recuperación, adaptación y transformación ante circunstancias difíciles, orientando las miradas científicas y/o militante hacia las fortalezas comunitarias en lugar de centrarse en los déficits o problemas.

Tal como afirma el Consejo General de la Psicología de España (2025), en el contexto ucraniano, la resiliencia comunitaria se manifiesta en las redes de apoyo social que han surgido como respuesta a la guerra, evidenciando cómo el apoyo comunitario puede amortiguar los efectos negativos del estrés y del trauma, y puede facilitar la recuperación de personas y comunidades por igual, de modo que:

El apoyo social aumenta la resiliencia y el afecto en las personas ucranianas afectadas por la guerra y que no se han desplazado como refugiadas, en comparación con aquellas que sí lo han hecho. La resiliencia se identifica como un factor dinámico y potencialmente mediador, siendo crucial también el papel potencial del apoyo familiar para amortiguar la angustia. (Consejo General de la Psicología de España, 2025, par., 1)

En el marco de la discusión actual, el conocimiento situado constituye una perspectiva epistemológica que afirma que la producción del saber está inevitablemente ligada a condiciones históricas, geográficas, culturales y políticas específicas. Este enfoque, consolidado inicialmente por Donna Haraway (1988), desde una postura feminista, cuestiona las aspiraciones de universalidad y neutralidad propias de la ciencia convencional, legitimando las vivencias subjetivas y contextuales como fuentes válidas de conocimiento. En el caso de Ucrania, cuya extensión territorial alcanza los 603.628 km² y cuya población, según el World Bank Group (2025), ronda los 36.744.636 habitantes, el conocimiento situado adquiere relevancia especial.

Las comunidades afectadas por la invasión rusa han debido reorganizarse, desarrollando estrategias de supervivencia fundamentadas en saberes locales y en una comprensión profunda de su entorno, entendido tanto en su dimensión simbólica como geográfica. Como destaca Aranzadi (2025), en regiones fronterizas como Járkiv, los residentes han generado saberes específicos que les permiten transitar por zonas de riesgo y preservar la cohesión social incluso bajo condiciones de hostilidad constante.

Las implicaciones teóricas de analizar la resiliencia comunitaria y el conocimiento situado en el contexto de la transición socioecológica requieren una revisión crítica de los paradigmas dominantes en las ciencias sociales y educativas, alineándose con perspectivas posmodernas como las de Lyotard (1989) y Foucault (2002). Desde una postura epistemológica posmoderna, estos conceptos desafían los enfoques positivistas y universalistas, abogando por visiones pluralistas y subjetivas que reconocen la multiplicidad de respuestas adaptativas ante crisis que impactan a la humanidad.

De igual modo, en el plano metodológico, este campo exige la adopción de enfoques participativos y transdisciplinarios, capaces de captar la complejidad de los procesos comunitarios de construcción de resiliencia, que integran tanto aspectos objetivos como subjetivos, materiales y simbólicos, concretos y abstractos. Asimismo, resulta importante valorar los saberes situados que emergen de la experiencia cotidiana. Por ello, es muy útil para las ciencias sociales críticas del siglo XXI desarrollar herramientas conceptuales y prácticas que permitan a las organizaciones comunitarias contar con orientaciones ágiles y pertinentes para actuar antes, durante y después de situaciones de emergencia social.

La motivación científica de este trabajo reside en la necesidad de producir saberes sociales que permitan analizar y fortalecer la capacidad de las comunidades para afrontar los retos socioecológicos actuales, desde una perspectiva que integre los conocimientos locales y los relacione dialogicamente con los procesos globales. Su pertinencia social se refleja en el contexto de múltiples crisis simultáneas —climática, energética, sanitaria y económica—, las cuales exigen cambios profundos en la manera en que habitamos y organizamos nuestras sociedades.

Siguiendo a Nussbaum (2012), la educación se posiciona en este contexto como un espacio estratégico para impulsar dichas transformaciones, lo que implica desarrollar estrategias innovadoras

orientadas a potenciar las capacidades internas¹ en los estudiantes, con miras a la sostenibilidad. El examen de casos como el de Ucrania, donde comunidades enteras han tenido que adaptarse con rapidez a condiciones extremadamente adversas, aporta lecciones relevantes para sociedades que enfrentan los desafíos de la transición socioecológica en distintos contextos y regiones del mundo.

En términos operativos, la estructura de este estudio comprende cinco partes interrelacionadas, cada una orientada al logro del objetivo general. La primera sección aborda los fundamentos teóricos; la segunda describe la metodología y las técnicas empleadas para procesar la información obtenida durante la investigación. La tercera parte, posiblemente la más relevante, se centra en el análisis y discusión de los resultados. Finalmente, la última sección presenta conclusiones y recomendaciones que, sin pretensión de universalidad, reflejan las perspectivas y sesgos propios de los autores de este trabajo.

MARCO TEÓRICO

La perspectiva sociológica sobre la resiliencia comunitaria, formulada por Stefan Vanistendael (2004), constituye un aporte relevante tanto para las ciencias sociales como para la psicología, al delinear cinco dimensiones interrelacionadas que sustentan los procesos resilientes. Estas dimensiones comprenden:

- La aceptación de uno mismo.
- La búsqueda de sentido vital.
- El desarrollo de competencias personales y sociales.
- El uso de un humor positivo.
- La disposición para afrontar nuevas experiencias.

En su análisis, Vanistendael (2004) subraya que la aceptación, el perdón y la construcción de significado son pilares esenciales de la resiliencia, ilustrando su modelo a través de la metáfora de la “casita”, que representa cómo se edifica la resiliencia tanto a nivel individual como colectivo. Este enfoque ha resultado especialmente útil para explicar cómo comunidades localizadas logran sostener la cohesión social y la capacidad de respuesta frente a traumas colectivos, como los generados por conflictos bélicos o desastres naturales, proporcionando un marco analítico que facilita la identificación de recursos y mecanismos que promueven la recuperación y la transformación social.

Por otro lado, la visión ecosistémica de la resiliencia, desarrollada por Michael Ungar (2013) desde el Centro de Investigación sobre Resiliencia de la Universidad de Dalhousie, constituye otra referencia teórica esencial para este estudio. Ungar (2013), conceptualiza la resiliencia como un proceso que es, al mismo tiempo, ecológico, cultural y dependiente del contexto. Este proceso implica la habilidad para acceder y movilizar recursos psicológicos, sociales, culturales y materiales que favorecen el bienestar, así como la capacidad individual y colectiva de negociar el acceso a estos recursos de formas culturalmente pertinentes. Sin embargo, es importante señalar que:

¹Para Nussbaum (2012), las Capacidades internas se definen como rasgos de la personalidad, capacidades intelectuales y emocionales, estado de salud y de forma física, aprendizaje interiorizado o habilidades de percepción y movimiento, los cuales configuran habilidades y destrezas particulares en cada persona.

There is enough evidence to assert that processes associated with resilience protect against the traumatic effects associated with acute and chronic stressors, but the mechanisms are complex and contextually and culturally dependent. A criticism of some of the literature reviewed in this article, however, could be that much is based on qualitative studies and that there is little to support arguments for the generalizability of findings across populations. (Ungar, 2013, p. 263)

Esta teoría supera las visiones individualistas al afirmar que la resiliencia surge de la interacción compleja entre personas y sistemas socioecológicos, resaltando la importancia de los factores estructurales y contextuales. La realidad del conflicto en Ucrania reafirma este planteamiento, ya que impulsa el fortalecimiento del liderazgo en las organizaciones civiles mediante estrategias educativas orientadas a la transición socioecológica del siglo XXI, reconociendo así el carácter colectivo y situado de los procesos resilientes. En paralelo, la teoría del capital social aplicado a la resiliencia comunitaria, con aportes de autores como Freyre (2013), proporciona un marco interpretativo adicional para comprender cómo las comunidades movilizan recursos relacionales frente a la adversidad. Esta perspectiva examina cómo los vínculos entre individuos y grupos (bonding capital), las conexiones entre distintas comunidades (bridging capital) y las relaciones con instituciones y estructuras de poder (linking capital) configuran la capacidad colectiva de respuesta ante situaciones críticas.

De manera complementaria, la teoría del conocimiento situado, iniciada por Donna Haraway (1988) y desarrollada por teóricas feministas, cuestiona los paradigmas epistemológicos dominantes y valora los saberes surgidos de experiencias localizadas. Esta visión, tanto teórica como filosófica, reconoce que todo conocimiento se genera desde posiciones específicas determinadas por coordenadas geográficas, históricas, culturales y de poder, desafiando la pretensión de objetividad descontextualizada propia de la ciencia tradicional occidental. Aplicada al ámbito de la resiliencia comunitaria, esta teoría permite comprender cómo las comunidades producen conocimientos particulares a partir de sus experiencias adversas, legitimando formas de saber que suelen ser marginadas por los discursos académicos hegemónicos.

Las teorías revisadas coinciden en reconocer la naturaleza multidimensional, contextual y dinámica de la resiliencia comunitaria, así como la relevancia de los saberes localizados en los procesos de adaptación y transformación social. Desde el modelo de la “casita” de Vanistendael (2004), pasando por la ecología de la resiliencia de Ungar (2013), hasta las perspectivas del capital social y el conocimiento situado, todas estas aproximaciones teóricas desplazan el foco desde los déficits hacia las potencialidades colectivas, y desde los modelos universalistas hacia el reconocimiento de la diversidad de respuestas adaptativas.

Por estas razones, la resiliencia implica un cambio paradigmático que prioriza la atención en las fortalezas, en lugar de los déficits o problemas, con profundas implicaciones ontológicas para las estrategias educativas orientadas a la transición socioecológica. Dichas teorías invitan a repensar la educación como un proceso arraigado en contextos específicos pero conectado con desafíos globales, capaz de movilizar y potenciar los recursos comunitarios para imaginar y construir futuros sostenibles a partir de las experiencias y saberes locales.

METODOLOGÍA

Los investigadores adoptaron un enfoque constructivista y posmoderno respecto al conocimiento, reconociendo que toda producción epistémica surge de contextos definidos por coordenadas simbólicas, temporales y espaciales particulares. Esta perspectiva epistemológica, vinculada

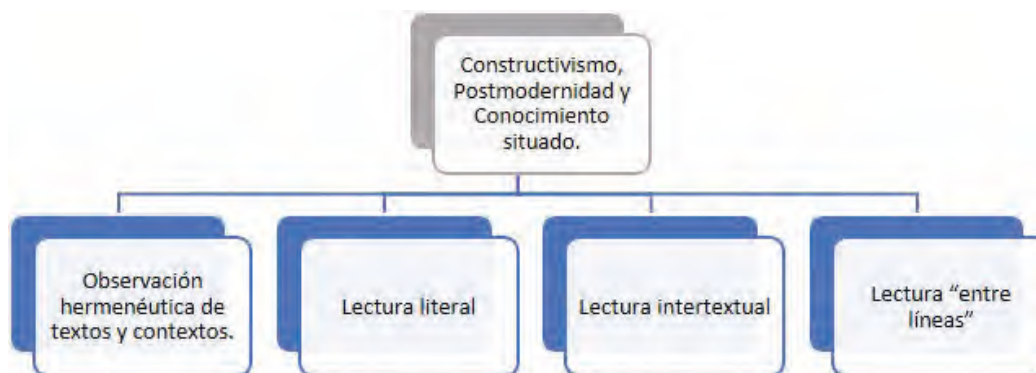
al conocimiento situado de Haraway (1988), así como a los planteamientos de Foucault (2002) y Lyotard (1989), cuestiona la aspiración de universalidad en los saberes sociales al evidenciar que incluso los conocimientos considerados “científicos” están mediados por marcos culturales e históricos específicos, imposibles de trascender. Por tanto, la investigación se concibió como un ejercicio de reflexividad crítica, en el cual la subjetividad se incorpora como un elemento analítico central, siguiendo los principios de la epistemología feminista que subraya la posición situada del investigador.

En este caso en particular, el procedimiento metodológico se fundamentó en la observación hermenéutica de fuentes académicas y periodísticas, empleando tres modalidades de lectura: literal (decodificación superficial), intertextual (diálogo entre textos) y lectura “entre líneas” (identificación de supuestos implícitos) (Sánchez, 2011). Esta estrategia permitió identificar múltiples niveles de significado en materiales como informes sobre la guerra en Ucrania, análisis sociológicos de resiliencia comunitaria y estudios sobre pedagogías críticas. Así, se siguió una hermenéutica entendida, según Moreno (2008), como un proceso iterativo entre partes y totalidades textuales y contextuales, que posibilita la interpretación dinámica de datos situados.

En términos operativos, la investigación se organizó en cuatro etapas interrelacionadas: 1) Exploración conceptual (mapeo teórico de resiliencia y conocimiento situado); 2) Inmersión contextual (análisis de casos como Ucrania); 3) Síntesis interpretativa (triangulación de hallazgos); y 4) Propuesta educativa (diseño de estrategias pedagógicas). Cada fase integró retroalimentación constante a través del denominado “círculo hermenéutico”, en el cual, conforme a Ferrater (2004), las interpretaciones parciales se contrastan de manera continua con nuevas evidencias y marcos teóricos, ya sean complementarios o antagónicos.

El procesamiento de la información combinó técnicas cualitativas relevantes: codificación temática de narrativas comunitarias, análisis crítico del discurso en políticas educativas y sistematización de prácticas resilientes. Más allá de las limitaciones propias de la perspectiva cualitativa en el ámbito del conocimiento social, este enfoque multimodal responde a la complejidad del objeto de estudio, requiriendo instrumentos interpretativos flexibles que permiten captar las dimensiones sociohistóricas de los saberes situados (Martínez, 2004).

CUADRO 1. Arquitectura metodológica y epistemológica de la investigación.



Fuente: Elaborado por los autores (2025), con base a los aportes de (Ferrater, 2004; Foucault, 2002; Haraway, 1988; Moreno, 2008; Martínez, 2004).

El Cuadro 1 ilustra de manera esquemática la estructura metodológica y epistemológica adoptada en este estudio, a través de una red conceptual jerarquizada en la que cada nodo representa un componente esencial del proceso investigativo. El punto de partida lo constituye la epistemología constructivista, que sustenta la aproximación hermenéutica empleada y orienta los distintos tipos de lectura aplicados. Estas modalidades de lectura nutren las distintas fases de la investigación, guiando el flujo hacia el procesamiento y el análisis de la información, y desembocando finalmente en una síntesis interpretativa expresada en las conclusiones. Asimismo, el diseño metodológico pone de manifiesto el carácter no lineal de la investigación cualitativa, donde la interpretación se construye a partir de ciclos iterativos entre el marco teórico y la realidad contextual, evitando la pretensión de universalidad (Martínez, 2004). La representación en red permite visualizar cómo los elementos metodológicos interactúan de forma dinámica, superando las perspectivas rígidas y lineales propias de los enfoques positivistas.

ANÁLISIS Y DISCUSIÓN CRÍTICA DE RESULTADOS

Según Neill (2025), la resiliencia comunitaria en la Ucrania actual se expresa como un proceso dinámico de adaptación colectiva, donde la descentralización política ha permitido que las comunidades locales desarrollen capacidades autónomas para gestionar las crisis derivadas del conflicto bélico, iniciado en febrero de 2022. Este proceso se apoya en la consolidación de redes sociales horizontales que, de acuerdo con Deineko (2023), han incrementado la cohesión social a niveles inéditos durante la guerra, con un 78% de la población involucrada en iniciativas voluntarias de autogestión. En este escenario, la sinergia entre instituciones locales fortalecidas y prácticas ciudadanas de apoyo mutuo ha dado lugar a un ecosistema resiliente que va más allá de la sola supervivencia. Se orienta hacia la reconstrucción activa del tejido social y la generación sostenida de capital social, evidenciando que:

Russia's full-scale military invasion1 dramatically changed Ukrainian society at all social levels – institutional, group, and individual. It transformed normative systems, the functioning of social institutions, and the quality of social relationships. In times of active warfare, society started to elaborate a renewed system of social norms, senses, and patterns of behavior regarding survival needs. (Deineko, 2023, p. 155)

Tanto en el plano teórico como en la realidad concreta de las experiencias cotidianas, el conocimiento situado se constituye como elemento central de estas dinámicas, especialmente en la utilización estratégica de datos abiertos para la toma de decisiones en contextos de conflicto armado. De acuerdo con la European Union (2022), comunidades como las de Járkiv han creado sistemas de alerta temprana fundamentados en inteligencia colectiva, integrando tecnologías digitales con conocimientos tradicionales del territorio. Desde nuestra perspectiva, esta epistemología localizada cuestiona los modelos educativos centralizados, evidenciando cómo el conocimiento producido “desde las bases” puede mejorar las respuestas ante amenazas complejas. Indudablemente, el conflicto bélico ha acelerado procesos intersubjetivos de innovación social donde la adaptabilidad cognitiva de los ciudadanos se transforma en un recurso estratégico de resistencia y resiliencia.

Un caso ejemplar lo representan las redes de voluntarios que coordinan la logística humanitaria a través de plataformas digitales autogestionadas. La investigación sobre voluntariado de Boichak (2023) revela que, en Odesa, un grupo ciudadano desarrolló un sistema de distribución de alimentos utilizando algoritmos predictivos calibrados según patrones de bombardeos, combinando datos satelitales con el conocimiento local sobre refugios subterráneos. Esta solución híbrida, que fusiona

tecnología avanzada con saberes comunitarios, logró reducir en un 40% el tiempo de respuesta ante emergencias, según evaluaciones independientes.

“When Ukrainians volunteer, they do not only attempt to alleviate immediate issues – they also promote and/or create a new civic and political culture,” said Dr Boichak. “In this way, volunteerism is political even if the immediate goal may not be the restructuring of the political system. Through their acts of engaged citizenship, the volunteers are actively crafting solidarities across citizens around their participation in grassroots voluntary initiatives. (Boichak, 2023, par., 4)

Para abordar la cuestión sobre qué estrategias pedagógicas innovadoras pueden emerger del diálogo entre el conocimiento situado y las demandas de la transición socioecológica global, se observa que, en un escenario de crisis orgánica como el que enfrenta Ucrania, la primera propuesta educativa consiste en la incorporación de currículos de alfabetización ecológica crítica. Estos currículos se fundamentan en un modelo de evaluación multidimensional desarrollado por instituciones ucranianas, según lo señalado por Kharchenko et al. (2020).

En general, este enfoque curricular particular integra el estudio de conflictos ambientales locales con simulaciones orientadas a la gestión sostenible de recursos, tomando como ejemplo la reconstrucción postbélica de infraestructuras energéticas. Además, la capacitación docente en pedagogías de la complejidad facilitaría la integración de conocimientos técnicos con saberes tradicionales relacionados con la agricultura resiliente.

La segunda propuesta educativa implica la creación de plataformas digitales colaborativas destinadas a la cartografía de prácticas comunitarias de adaptación climática, siguiendo el modelo del programa *Can't Wait to Learn* (War Child, 2025). Dichas plataformas, alimentadas por inteligencia colectiva, promueven el intercambio transnacional de soluciones locales frente a desafíos globales. Un proyecto piloto implementado en Leópolis evidenció que la gamificación de contenidos sobre la gestión del agua aumentó en un 35% la retención de conocimientos entre estudiantes de secundaria. En esencia, se busca desarrollar soluciones digitales que, por un lado, integren la resiliencia comunitaria y el conocimiento situado, y por otro, respondan a las necesidades educativas de niños afectados por el impacto de la guerra.

In the face of war, the fundamental right to education stands vulnerable. Educational disruption is preventing children from learning basic literacy and numeracy skills that are essential for their development. The need for innovative solutions to support learning amidst the ongoing chaos is urgent.

The stories from young learners are heart-wrenching. “I miss my school,” says Anya, a 10-year-old from Kyiv. “I miss my friends and my teacher, but now we have to hide whenever we hear the alarms.” Such personal accounts underline the urgency of finding solutions that work even in displacement and uncertainty. (War Child, 2025, parr. 5 y 6)

Siguiendo esta línea de pensamiento, la tercera propuesta radica en la implementación de laboratorios ciudadanos orientados a la innovación socioecológica en áreas de posconflicto, inspirándose en la experiencia previa de los centros tecnológicos (hubs) establecidos por iniciativas voluntarias. Estos espacios tecnológicos se piensan como núcleos de experimentación colaborativa, donde las comunidades locales, el personal académico y las autoridades pertinentes puedan co-diseñar soluciones adaptativas a los desafíos específicos de cada contexto. Como ejemplo relevante, en Mykolaiv, una iniciativa de características similares posibilitó la restauración del 60% de las áreas verdes urbanas que habían sido destruidas, mediante la aplicación de técnicas de fitorremediación basadas en el conocimiento local (Boichak, 2023).

CUADRO 2. Cartografía conceptual general de la resiliencia y el conocimiento situado.

Resiliencia Comunitaria	Conocimiento Situado	Estrategias Socioecológicas	Observaciones
Reconstrucción participativa	Pedagogías de complejidad	Redes de voluntariado local	Las estrategias suceden desde la propia planificación de los actores de la sociedad civil organizada, normalmente, no proviene de las instancias políticas institucionales. Lo que no significa que se niegue a priori la posibilidad de vincular la autogestión y la acción institucional.
Capacidad de organización intersubjetiva	Sistemas de alerta comunitario	Autogestión logística	
Acción colectiva ante la crisis.	Saberes agrícolas resilientes	Plataformas digitales colaborativas	
	Cartografía social de riesgos	Laboratorios ciudadanos	

Fuente: elaborado por los autores (2025).

El cuadro 2 presenta una síntesis de la interacción dialéctica entre los elementos estudiados. En este contexto, las prácticas resilientes se alimentan de conocimientos situados que, a su vez, se enriquecen mediante estrategias educativas transformadoras. Desde una perspectiva sociológica, este “triángulo virtuoso” representa la superación de las dicotomías clásicas entre la acción colectiva espontánea y la planificación institucional, dependiendo siempre de las circunstancias específicas.

La evidencia bibliográfica indica que el conflicto bélico ha impulsado procesos de innovación social en los cuales la educación, según Verkhovod *et al.*, (2024), se convierte en un espacio epistemológico para la co-creación de prácticas y saberes situados, facilitando que soluciones locales puedan escalar y responder a desafíos globales a través de estructuras participativas. Este esquema conceptual general sobre resiliencia y conocimiento situado plantea que la transición socioecológica demanda pedagogías profundamente contextualizadas, capaces de integrar la memoria colectiva con perspectivas prospectivas orientadas a la sostenibilidad.

REFLEXIONES FINALES

Mediante un ejercicio hermenéutico profundo, esta investigación ha revelado cómo la interpretación contextual de fenómenos socioecológicos permite comprender la compleja articulación entre la capacidad adaptativa comunitaria, epistemologías territoriales y procesos educativos transformadores. En este sentido, la mirada hermenéutica ha sido calve para desentrañar los significados situados que emergen de las experiencias colectivas en contextos de crisis, permitiendo una comprensión más completa que trasciende las interpretaciones lineales y abraza la naturaleza circular y dialógica del conocimiento social.

En la capacidad adaptativa comunitaria, las epistemologías locales y los procesos pedagógicos configuran una estructura epistemológica triangular donde cada componente se nutre mutuamente en un proceso interpretativo continuo. Desde una perspectiva interpretativa, esta investigación ha identificado que la capacidad de recuperación surge de dinámicas colectivas fundamentadas en saberes territoriales, mientras que los procesos educativos funcionan como dispositivos de sistematización y socialización de dichas epistemologías, generando ciclos de retroalimentación que, siguiendo los planteamientos de Lopushniak *et al.*, (2024), convierten la adaptación en innovación socioecológica.

Este fenómeno, documentado en poblaciones ucranianas que articulan prácticas agrícolas ancestrales con tecnologías contemporáneas de cartografía bélica (Kharchenko y otros, 2020), demuestra cómo la pedagogía contextualizada puede impulsar transformaciones sostenibles al conectar la memoria biocultural con propuestas futuras. En este contexto, la hermenéutica ha permitido interpretar estos procesos no como fenómenos aislados, sino como manifestaciones de un círculo comprensivo donde las experiencias particulares cobran sentido dentro del contexto histórico-cultural más amplio del que forman parte.

Quedo claro que, frente al cuestionamiento fundamental sobre los mecanismos de construcción de la capacidad adaptativa comunitaria en escenarios de crisis socioecológica y junto el papel de las epistemologías situadas en dicho desarrollo, la interpretación revela que la configuración de la resiliencia comunitaria en crisis socioecológicas se fundamenta decisivamente en la habilidad para activar conocimientos contextualizados que decodifican las especificidades territoriales a través de la comprensión de sus signos y símbolos distintivos (Foucault, 2002).

En el contexto ucraniano, el conflicto bélico ha evidenciado que la resistencia social construye cohesión comunitaria a través de redes de solidaridad mutua, donde las epistemologías locales sobre rutas de evacuación y recursos naturales se articulan con inteligencia colectiva digitalizada. Este tejido sociocognitivo posibilita que las comunidades no solamente persistan, sino que re-conceptualicen en cada momento sus ecosistemas urbanos y rurales bajo principios de autonomía ecológica, cuestionando en el proceso los modelos pedagógicos centralizados que tradicionalmente han invisibilizado los saberes no académicos y los no occidentales. En este particular, la lectura hermenéutica de la realidad misma ha sido crucial para comprender estas dinámicas como parte de un proceso interpretativo donde los actores sociales construyen significados, a partir de sus experiencias vividas, reconociendo que la comprensión no es neutral sino influenciada por contextos históricos y culturales específicos.

Al abordar lo que significan los modelos pedagógicos, emerge la interrogante sobre las contribuciones de las experiencias comunitarias en situaciones extremas, como el caso ucraniano, para la construcción de modelos educativos transformadores. De modo que resulto necesario reconocer que las vivencias ucranianas proporcionan marcos pedagógicos basados en “pedagogías de la urgencia”, donde plataformas colaborativas cartografían necesidades en tiempo real mientras desde la conservan de las tradiciones orales de gestión de recursos simbólicos (Deineko, 2023). Aquí, las instituciones educativas como las universidades de Járkiv han desarrollado currículos híbridos que integran técnicas de agricultura resiliente con programación de drones, evidenciando que la educación en contextos bélicos demanda integración transdisciplinaria (Spivakovsky *et al.*, 2025). Estos modelos, más allá de sus restricciones, privilegian la agencia comunitaria sobre la homogenización, transformando los espacios educativos en núcleos de innovación socioecológica donde estudiantes co-construyen soluciones con actores territoriales.

Desde la perspectiva de los investigadores y con un fundamento en la interpretación hermenéutica de los hallazgos, una teoría social emergente para abordar estas temáticas, científicamente, debería estructurar al menos cuatro dimensiones específicas pero interrelacionadas: 1) Epistemología contextualizada, valorando el conocimiento territorial como catalizador de innovación adaptativa; 2) Pedagogías colaborativas, empleando tecnologías distribuidas para escalar soluciones comunitarias; 3) Gobernanza polifónica, incorporando voces diversas en los procesos decisorios; y 4) Memoria prospectiva, conectando tradiciones culturales con escenarios futuros.

Por lo demás, esta estructura teórica, inspirada en el modelo del Capital Social de Freyre (2013), superaría el dualismo entre acción local y planificación global al establecer redes multinivel de intercambio epistémico. Sin ninguna duda, la hermenéutica ha permitido comprender que esta arquitectura no es un marco estático, sino un proceso interpretativo dinámico donde cada dimensión se comprende en relación con las demás el mundo más amplio de los textos y de sus contextos.

Por lo tanto y desde esta visión epistemológica hermenéutica, tal teoría debería incorporar mecanismos de traducción intercultural que faciliten la transferencia de conocimientos entre contextos sin desarraigarlos, evitando colonialismos epistémicos. Esto implica construir métricas de resiliencia cualitativas que valoren la diversidad biocultural, contrastando con los indicadores economicistas predominantes. Finalmente, la teoría debe conceptualizar la educación como campo de negociación epistemológica donde se construyen futuros posibles.

La propuesta de los autores de esta investigación se centra en desarrollar un modelo de “investigación-acción contextualizada” donde académicos y comunidades co-construyen conocimientos mediante laboratorios ciudadanos, tal como se evidencia en los centros tecnológicos de Odesa. Esta aproximación, que concibe la resiliencia como proceso de construcción colectiva más que como mera resistencia, ofrece un marco coherente para reconstruir tejidos sociales en zonas de conflicto mediante pedagogías radicalmente contextualizadas.

Finalmente, desde la perspectiva hermenéutica, este enfoque reconoce que el investigador se convierte en participante activo del proceso interpretativo, donde la reflexividad --el proceso de examinar críticamente los propios prejuicios y suposiciones-- se convierte en el aspecto crucial de la investigación al integrar lo objetivo con lo subjetivo. Este modelo puede transformar, bajo condiciones objetivas y subjetivas determinadas, el trauma social en potencial socioecológico, operando a través de un círculo hermenéutico donde las experiencias particulares de crisis se interpretan dentro del contexto más amplio de la transformación y el capital social, generando una nueva comprensión que informa futuras acciones comunitarias. Por lo tanto, la hermenéutica, como marco metodológico de esta investigación, ha facilitado no solo la interpretación de los fenómenos estudiados, sino también la comprensión de que estos significados se construyen e interpretan en contextos históricos, culturales y personales específicos, revelando la naturaleza inherentemente dialógica y situada del conocimiento sobre resiliencia comunitaria.

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ARTÍCULO DE INVESTIGACIÓN

Simulación y aprendizaje social: estrategias para la formación comunicativa de futuros abogados*

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Resumen. El artículo considera las herramientas pedagógicas que implican la simulación de situaciones de interacción profesional para abogados y su uso en la educación jurídica superior para fomentar y desarrollar la competencia comunicativa. La simulación de situaciones de la práctica jurídica basadas en hechos reales o la imitación de procesos jurídicos en los que los estudiantes actúan como abogados o funcionarios aumenta el interés por las disciplinas estudiadas, fomenta el proceso de aprendizaje y desarrolla tanto las competencias profesionales como las comunicativas. Los autores concluyen que en el proceso educativo deberían utilizarse diversas herramientas didácticas, prestando especial atención a aquellas que preparan a los futuros abogados para la interacción y cooperación profesional en diversas situaciones jurídicas. Los juegos de rol basados en la simulación de la interacción profesional son un medio eficaz para desarrollar la competencia jurídica y comunicativa de los estudiantes. Las conclusiones del estudio contribuyen a ampliar y actualizar la comprensión científica de las herramientas didácticas que simulan la interacción profesional y su aplicación en la educación jurídica superior.

Palabras clave: educación jurídica, competencia comunicativa del abogado, modelización de situaciones profesionales, juegos de empresa, enfoque basado en proyectos, habilidades comunicativas, estudiantes.

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Simulation and social learning: strategies for the communicative training of future lawyers

Abstract. The article considers pedagogical tools that involve the simulation of professional interaction situations for lawyers and their use in higher legal education to foster and develop communicative competence. Simulating situations from legal practice based either on real-life events or the imitation of legal processes in which students act as lawyers or officials enhances interest in the studied disciplines promotes the learning process and develops both professional and communicative competences. The authors conclude that various didactic tools should be used in the educational process, with particular attention given to those that prepare future lawyers for professional interaction and cooperation in diverse legal situations. Role-playing games based on the simulation of professional interaction are an effective means of developing students' legal and communicative competence. The study conclusions contribute to expanding and updating the scientific understanding of didactic tools that simulate professional interaction and their application in higher legal education.

Key words: legal education, lawyer's communicative competence, modeling of professional situations, business games, project-based approach, communicative skills, students.

INTRODUCTION

High-quality education is the fourth of the UN Sustainable Development Goals. This indicates the importance of professional education, which is gaining international significance. UNESCO promotes global citizenship education through the Recommendation on Education for Peace, Human Rights, International Understanding, Cooperation, Fundamental Freedoms, Global Citizenship and Sustainable Development (UNESCO, n.d.) and the Recommendation on Education for Peace, Human Rights and Sustainable Development (UNESCO, 2023), both serving as guiding documents for how teaching should evolve in the 21st century. This approach focuses on developing cognitive, social, and other skills that enable students to apply their knowledge and align it with their real-life experiences (such as thinking critically, questioning what is just, understanding and accepting other perspectives, resolving conflicts constructively, working in teams, and interacting with people of diverse backgrounds, cultures, and perspectives). According to the Standards and Guidelines for Quality Assurance in the European Higher Education Area (ESG) of 2015, higher education institutions must ensure the use of diverse teaching methods and flexible pedagogical approaches. These teaching methods and tools lay the foundation of modern educational didactics.

In recent years, the level of communicative competence among specialists has increasingly been viewed as a critical component of professional suitability, providing a distinct competitive advantage in any profession (Usmanova et al., 2023). A lawyer's professional activity takes place in a communicative environment which often constitutes the core of their work and becomes a unique form of labor, i.e., professional communication (Vishnevskaya, 2006: 70). Effective legal practice requires various communication skills, including the ability to listen, speak, persuade, use precise verbal expressions of legal concepts, and correctly interpret laws and regulations, as well as argumentation and negotiation skills. This list makes it clear that a lawyer's communicative competence involves a

broad range of skills aimed at comprehending and producing speech in diverse situations of professional communication (Dubrovskaya, 2012: 291).

The simulation of professional legal situations based on actual events or the imitation of real legal processes in which students take on the roles of lawyers or officials enhances engagement with the studied disciplines, stimulates the learning process, and encourages additional efforts to acquire professional knowledge and skills (Ramsden, 2005).

Simulating professional legal activities involves the active participation of students in the educational process, facilitating a deeper understanding of their future profession. This approach allows students to develop the necessary professional skills and competences, enabling them to reinforce theoretical knowledge and to learn how to apply it, particularly in social interactions. With this goal in mind, Y. Sangroula advocates for legal pedagogy based on social justice. The scholar believes that law schools should instill in students the habits and commitment to act like a lawyer from the very first day they enter law school. Therefore, the development of professional competence among students should be a priority for law schools (Sangroula, 2020).

The simulation of professional interaction for lawyers in higher legal education is primarily achievable through practical tools and methods, such as business (role-playing) games, solving practical case studies, and stimulating approaches like the project-based method.

LITERATURE REVIEW

The literature analysis suggests that the process of simulating professional situations in the training of future lawyers has been explored in a few academic papers. According to S.M. Struganov and E.V. Panov, the term “simulation” refers to the study of situations (objects) of knowledge through their models, meaning the construction of simplified copies of real situations to visually demonstrate possible operational and service scenarios, anticipating their outcomes and developing solutions. A police officer trained using the simulation method will be better prepared to respond effectively when carrying out operational tasks (Struganov & Panov, 2023).

We agree with E.A. Rassolova (2017: 75) who points out that “the simulation of professional situations is an important tool for systematizing legal knowledge and specialized disciplines, integrating them into practical activity by applying and adapting them to real-life tasks”.

Thus, the simulation of professional situations in the training of future lawyers makes the learning process more effective and promotes the development of professional and communicative competences. Legal communicative competence entails the necessary communication knowledge, skills, and abilities required in legal practice; mastery of verbal and non-verbal means of communication; communicative flexibility; and the use of language encompassing legal terms and categories. The latter includes speech patterns, expressions, and constructions that meet the requirements of speech etiquette and legal technique, which play a crucial role in fostering and maintaining effective interaction in professional legal activities.

The range of methods and techniques for developing communicative competence in the educational process is expanding. These include case studies (Karagozoglu, 2017: 13), game-based learning sessions (Dias, 2017: 98), specialized interviews, group project methods, etc.

There are several approaches to the concept of business games. From the perspective of S.Y. Ryvkin,

“A business game is one of the active learning methods reproducing the activities of the participants. It is an effective teaching method as it resolves the contradictions between a theoretical discipline and real-life professional activity. Through business games, students gain insights into working in investigative agencies and expert institutions, which may be useful for their future careers” (Ryvkin & Ivchenko, 2021: 210).

D.V. Chernilevsky (2020: 65) claims that a business game represents “the purposeful organization of educational and gaming interactions among students as they simulate the professional activities of a specialist”.

According to K.M. Noralieva (2020: 290), “a business game is a form of recreating the objective and social content of a specialist’s future professional activity, modeling the relationships typical of this activity, professional problems, real contradictions and difficulties faced in typical professional situations”.

Being a tool for simulating various conditions of professional activity, aspects of human action and social interaction, a business game serves as both “a method for discovering new ways of performing tasks” and “an effective teaching method as it resolves the contradictions between the abstract nature of the academic subject and the real-life professional activity” (Bocharova, 2006: 35).

Z.M. Khutyk (2014: 37) defines a business game as “a specially organized management process that integrates the professional activities of the teacher aimed at developing and refining their professional skills and abilities”.

N.A. Astashova emphasizes that game processes are a “realm of emotionally rich communication”, which requires developing specific relationships and facilitates participants’ self-expression. Including students in games should bring positive emotions, drawing on the game’s potential, and thereby use informational, emotional, and interactive tools to achieve high-quality outcomes in future professional activities (Astashova et al., 2023: 15).

Learning through business games is a preferred method when the goal is to teach specific behavior patterns or skills. They provide a safe environment that simulates real-life scenarios (Varughese et al., 2024).

Chinese scholars reviewed academic publications from 2009 to 2020, analyzing game-based learning in higher education. Based on the data collected, they noted that acquiring practical skills is considered the most important goal in game-based learning, followed by knowledge acquisition and changes in communicative behavior (Zheng et al., 2024).

Under the first approach, a business game is a teaching method used to reinforce theoretical knowledge and to develop specific professional competences. According to the second approach, it is a tool for developing communication skills, enabling the improvement of effective communication and teamwork. In conformity with the third approach, it is a tool for fostering creativity and creative thinking.

Despite the abundance of publications on this topic, there is a lack of research on the simulation of professional legal interactions and its application in higher legal education.

MATERIALS AND METHODS

The research object is the simulation of professional legal interactions within higher legal education to foster and develop legal communicative competence.

The study is conceptual in nature and is based on a doctrinal legal research methodology. To achieve the objectives of the research, the authors applied general scientific methods of cognition, including the principles of objectivity, systematicity, and comprehensiveness. Systemic and theoretical analysis was conducted to assess the current state of economic security regulation in Russia and to identify key gaps and trends in its development.

This study uses scientific materials that explore the concepts, educational practices, and features of business games and project-based work simulating professional interaction situations in legal education. These materials comprise scientific research on the didactics of legal education, works by leading global scholars in the field of higher legal education methodology, and UNESCO materials and reports on education freely available on the Internet and in official publications.

The research is based on the analytical review of legal acts, presidential decrees, federal laws, and academic literature published from 1992 to 2024. No empirical methods such as surveys, experiments, or fieldwork were employed. Accordingly, the study should be classified as a theoretical-analytical essay, aimed at systematizing existing knowledge and offering a critical examination of the legal means of ensuring economic security in the Russian Federation.

Using systemic and comparative methods, we identified specific features of applying pedagogical tools, including simulating professional legal interaction, in higher legal education. This enabled the formulation of recommendations for incorporating business games into the educational process, focusing on developing the communicative competence of future legal professionals.

The study also employed an approach to examine the effectiveness of business games in developing professional and communicative competences among law students at Ogarev Mordovia State University. The main focus was on assessing the impact of simulating professional interaction situations through business games on the ability of students to apply theoretical knowledge in practice. Following the business games, a survey was conducted to evaluate students' perceptions of the educational value of these activities.

Pedagogical research methods addressing didactic issues related to the simulation of professional legal situations in higher legal education helped draw conclusions about the specifics of conducting such sessions and the nature of the teaching methods and technologies used during student training.

RESULTS

Simulation in the educational process for training future lawyers involves the following stages: the preparatory stage aimed at forming legal knowledge in students, selecting professional tasks and situations for simulation, assessing students' readiness to solve professional tasks, and allocating resources for organizing the simulation process; the analysis of situations reflecting the most critical aspects of legal problem-solving; the simulation process focusing on the development of students' legal behavior when solving professional tasks; the discussion of solutions, including selecting and substantiating the most appropriate actions for solving problems (Rassolova, 2017).

The key issue in simulating professional legal situations in the educational process at law schools is selecting scenarios for business games that reflect modern legal practice, are relevant, and recreate complex, problem-based situations similar to those a future lawyer may face in real life.

Overall, the business game in legal education is a multifunctional tool for preparing students to engage in legal practice. It serves as a method for simulating and recreating diverse professional legal situations aimed to develop and refine students' professional legal skills, knowledge, abilities, and personal qualities.

In a business game, future lawyers can try various roles, ranging from judges and prosecutors to defense attorneys or legal consultants, and learn to make decisions under time and resource constraints. Students develop teamwork skills, improve their communication abilities, and learn to find compromises and resolve conflicts. Business games encourage the development of creative thinking and the ability to find unconventional solutions and overcome challenges. They also enhance communication by expanding interaction, developing language skills, and stimulating verbal activity (Daligdig et al., 2022).

Some scholars argue that among the indicators of pedagogical practices, only active learning correlates with communicative competence. This suggests that the longer students are involved in active learning, the higher their communicative competence becomes. Moreover, it indicates that when students engage in a learner-centered approach to education, they can practice skills such as competition, negotiation, and verbal and non-verbal communication, enhancing their communicative competence (Zhurbenko & Karlash, 2022).

Didactic conditions for role-playing games encompass interactions within the educational-communicative situation during the game and its preparation, execution, and discussion (Nikolaeva & Shutova, 2012).

The methodology and stages of organizing a business game should be viewed as a set of activities designed to conduct the game, which simulates real legal scenarios and allows participants to develop and improve their professional and communicative skills.

The methodology for conducting a business game includes developing a scenario and an action algorithm for the participants, where each student must actively participate, independently choose their actions, draw their conclusions based on legal information, quickly make scientifically and practically sound decisions, and discuss the intermediate and final results of their actions and those of other participants in the group. Using business games, the teacher immerses students in the professional activities of judges, lawyers, police officers, notaries, etc.

The preparation and organization of a business game can be divided into the following stages:

1. Preparation. At this stage, the goals and objectives of the business game are defined, the format is chosen, and the game scenario is developed. When modeling situations of professional legal interaction within a business game, it is important to consider the relationship between the goal, objectives, and results. The goal of modeling is to place participants in situations close to real ones to develop or strengthen their professional legal skills and practices.

Modeling can be adapted to various content as participants put themselves in the roles of others to make decisions, follow work procedures, apply legal tools, understand fundamental principles, rules, and knowledge, and develop a creative approach. The content, game process, and participation are discussed with the students in advance. A group of experts (three or four students) can be selected to carefully observe the course of the game and evaluate each participant's performance.

2. Introduction to the game. At this stage, students are provided with information about the game scenario. At the beginning, it is crucial to formulate the rules of the game. The instructor explains the rules, sharing their knowledge and analyzing the situation, while encouraging and stimulating critical thinking. The instructor must emphasize the mandatory use of legal information to ensure that conclusions are not based on simplified or widely accepted views. Specific roles are also determined for each participant. The modeling of professional activities allows for role-playing, where participants can take on the roles of plaintiffs, judges, prosecutors, public representatives, witnesses, or other legal actors. The instructor draws the attention of participants and experts to the importance of observing the behavior of others, actively listening, and understanding various communication codes. This stage sets the foundation for immersive participation, ensuring that students are ready to engage fully in the simulated professional context.

The scenario is a fundamental element of the business game. Typically, the scenario outlines the general sequence of the game broken down into key stages and steps. One of the most challenging aspects of designing a business game is selecting and describing the object of simulation (Navrotskaya, 2022). The simulation model reflects a typical fragment of professional legal activity that is relevant, controversial, and problem-based. It includes structured scientific and applied information that cannot be mastered individually. It is essential to avoid outdated or questionable material. If necessary, the instructor assists students in searching for, collecting, processing, and analyzing practical material. At this stage, the issue of inviting legal practitioners as experts is considered.

3. Game process. At this stage, students apply their theoretical knowledge to solve the tasks presented, interacting with each other within the framework of the game scenario. During this phase, the instructor's leadership, organizational, and managerial skills become essential. The instructor must adhere to the pre-developed scenario and focus exclusively on topics related to the subject matter. In our opinion, an interesting approach is to subtly push the participants toward altering the environment or the situation in an unexpected direction. This encourages participants to think creatively and search independently for more accurate solutions.

Students should be given more opportunities for self-expression, creativity, and autonomy, making the gameplay more natural and relaxed and allowing students and the instructor to see each other from different perspectives.

4. Analysis, discussion, summary, and evaluation. This stage involves the analysis of the game results, where the participants share their impressions and conclusions. They discuss alternative developments of the game, considering how different behaviors and positions of other participants could have changed the outcome. Experts and instructors assess the games' effectiveness, highlighting the positive and negative aspects of the participants' behavior and the expression of their positions. They also dwell on errors and suggest possible ways to correct them. Some scholars note that this stage should take about 40-50% of the lesson (Bezuglov et al., 2023).

Most modern law schools and faculties are equipped with courtrooms, legal clinics, and forensic laboratories, which allows the development and reenactment of various aspects of professional legal activities. Law students can recreate conflict resolution in labor or family law in a courtroom. In a legal clinic, business games can simulate the reception and interviewing of a client by a lawyer, imitating the work of a legal advisor or attorney consulting with a client.

Although the main goal of initiating clinical legal education was to provide law students with practical, industry-specific training, a recent trend has also emerged to incorporate legal aid pro-

grams and specialized professional education in line with court directives ensuring access to justice. Legal clinics at law universities play a key role in assisting underprivileged segments of society in gaining access to justice through legal aid programs, informational workshops, and lawyer training (Sharma & Kumari, 2024).

While preparing for business games, it can be useful to watch films depicting civil and arbitration processes and court proceedings or to attend real court hearings. It is important to study and compare these materials with the legislation in force (Yarkov & Dolganichev, 2020: 146).

Many scholars highlight that effective communication is crucial in legal practice. It is worth emphasizing the importance of studying models of interaction between prosecutors, defendants, and witnesses in courtrooms as part of legal education (Chow et al., 2023). The system of developing professional communicative competence in law students is based on the linguistic principles of communication.

Legal communication can only be successful if law students are familiar with the structure of a communicative act and can apply linguistic and psychological knowledge in communication. Mastering communication skills and dialogical interactions is essential in all spheres of public relations. Dialogue serves as the foundation of human understanding, and its role in the work of future lawyers is growing steadily. In a rule-of-law state, the ability to engage in constructive dialogue is especially important as it helps resolve democratic issues and avoid confrontation. Communicative competence and its qualities and skills should not be taken for granted. The process of mastering these skills must be conscious, purposeful, and aligned with professional needs.

Unlike legal knowledge acquired during training and refined through practice, professional behavioral patterns and communication skills must be gained during the educational process. Therefore, it is crucial to improve communication culture and develop communication skills, analytical thinking, creativity, and the ability to solve communication tasks in professional situations.

In addition to reinforcing theoretical knowledge and developing professional legal competences, business games contribute to developing psychological attitudes, communication skills, the ability to argue one's position, negotiation skills, etc.

As part of the educational process at the Law Institute of Ogarev Mordovia State University, we conduct business games simulating the professional activities of a lawyer. These include the legislative process within legislative bodies, judicial proceedings in criminal, civil, administrative, or constitutional courts, a lawyer's work in client consultations, negotiating contracts and deals, resolving various conflicts and disputes, and conducting mediation procedures in family, inheritance, or labor disputes. These simulations are integrated into courses like "Legal Conflictology" and "Legal Clinic". As a result of these business games, future lawyers can analyze problem-based situations in legal practice through the simulation of cases reflected in verdicts and court decisions found on judicial websites, which helps them better immerse in legal practice.

A survey of students on the effectiveness of using business games at Ogarev Mordovia State University shows that they report positive experiences. These include the development of professional interests and motivational skills, improved retention of theoretical material, quick search for relevant legal acts, enhanced teamwork and communication skills, activation of creative potential, and better assimilation of theoretical knowledge. The simulation of professional interactions in business games allows future lawyers to apply their theoretical knowledge in practice, develop com-

munication and leadership skills, and teach them organization and responsibility. In some cases, the competitive spirit among students during the game leads to a focus on winning rather than achieving the intended educational results.

The project-based approach in higher legal education allows students to solve real-life problems and find new solutions over a longer period. This method makes classes more engaging, with students learning new content and developing teamwork and research skills, which can lead to better collaboration and understanding, spark creativity, and contribute to more effective learning.

Examples of project-based learning in legal education include preparing and filming a documentary on some legal issue or resolving a potential legal conflict; creating legal-themed puzzles (with subtopics such as participants in legal processes, the legal process itself, causes, timelines, state and political events, etc.); solving social problems, i.e., the protection of the rights of minors or individuals with disabilities; developing documentation for the establishment of organizations with different legal structures.

We cannot but agree with M.V. Klarin that

“project-based learning changes the traditional function and role of the teacher, involving a wide range of people outside the classroom in the interaction, with the teacher acting as a facilitator, assistant, and mediator in the educational, research, and practical search of students” (Klarin & Osmolovskaya, 2020: 76).

The project-based approach may also include simulating situations of professional legal interaction. However, the teacher must carefully design the task and ensure it is completed in groups.

Thus, didactic tools that simulate professional legal situations encourage students to interact with their peers during practical sessions. This increases their academic workload but allows them to develop faster professionally and communicatively.

When developing didactic tools that involve modeling situations of professional legal activity, the educator must consider the following aspects: the content of a specific type of legal activity, real conditions, and practical cases; the recreation of controversial or problem-based situations typical of legal practice; the necessity of joint group work by students, interaction while performing duties and functions according to their roles; the features of students' communicative interaction in solving the educational tasks assigned and achieving the required result. For a lawyer, having extensive knowledge of the legal framework and the ability to apply this knowledge in practice is of great importance. In this regard, when developing teaching materials, it is necessary to cover theoretical legal issues and use learning tools that allow students to show initiative and independence in conditions that reflect real legal practice.

The evaluation and adjustment of the educational and methodological support of the courses (especially “Legal Clinic”) must consider cases and situations from real legal practice. We agree with certain scholars who recommend using a comprehensive approach to clinical legal education, applying simulation and working with real clients, to help students prepare for their legal practice (Dev, 2020: 412).

CONCLUSIONS

The analysis of learning processes shows that merely transmitting knowledge through repeating theories, concepts, rules, and laws is ineffective in ensuring knowledge retention. For this reason, it

is advisable to use didactic tools that present situations, problems, and cases within a specific context. Knowledge should be translated into practice, meaning the development of professional skills in practical scenarios.

A modern educator must possess professional and pedagogical competences and well-developed communication skills. Forming communicative competence is a key objective of education, particularly in the legal field, where the ability to articulate ideas and build productive relationships is essential for professional success. The effectiveness of this process depends on specific pedagogical conditions that foster communicative competence in future lawyers.

Thus, the simulation of professional communication situations in the educational process plays a crucial role in assimilating and systematizing legal knowledge and developing professional and communicative skills needed for its application.

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ARTÍCULO DE INVESTIGACIÓN

Tecnologías digitales y nuevas gramáticas del conocimiento. Desafíos epistemológicos en la sociedad digital

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Resumen. El mundo de hoy esta caracterizado en términos generales por la digitalización continua de la realidad, fenómeno que permite hablar de la consolidación de la sociedad digital y, supone, un conjunto de desafíos epistemológicos que demandan de estudio y reflexión filosófica sosegada. Desde la metodología típica del análisis epistemológico y mediante la selección documental de fuentes de comprobado valor científico, el objetivo de esta investigación fue problematizar y debatir filosóficamente los desafíos epistemológicos que enfrentan las nuevas gramáticas del conocimiento, en su relación dialéctica con las tecnologías digitales. La información procesada permite concluir que, el avance vertiginoso de la sociedad digital cuestiona progresivamente la legitimidad de los saberes humanísticos como la historia y la filosofía, poniendo en entredicho sus aportes mientras privilegia el desarrollo tecnológico y las ciencias exactas, ya que se adaptan mucho mejor a las economías abiertas movidas por el afán de lucro, como principio rector de la vida social. Este desequilibrio refleja una tensión epistemológica profunda entre distintas formas de conocimiento y sus respectivos criterios de validación y, más aún, entre el lucro y la libertad para ser y conocer.

Palabras clave: tecnologías digitales, nuevas gramáticas del conocimiento, desafíos epistemológicos, sociedad digital.

Digital technologies and new grammars of knowledge. Epistemological challenges in the digital society

Abstract. Today's world is characterized in general terms by the continuous digitalization of reality, a phenomenon that allows us to speak of the consolidation of the digital society and implies a set of epistemological challenges that demand study and calm philosophical reflection. From the typical methodology of epistemological analysis and through the documentary selection of sources of proven scientific value, the objective of this research was to problematize and philosophically discuss the epistemological challenges faced by the new grammars of knowledge, in their dialectical relationship with digital technologies. The information processed allows us to conclude that the vertiginous advance of digital society progressively questions the legitimacy of humanistic knowledge such as history and philosophy, questioning their contributions while privileging technological development and the exact sciences, since they are much better adapted to open economies driven by the profit motive, as a guiding principle of social life. This imbalance reflects a deep epistemological tension between different forms of knowledge and their respective criteria of validation and, moreover, between profit and the freedom to be and to know.

Keywords: digital technologies, new grammars of knowledge, epistemological challenges, digital society.

INTRODUCCIÓN

La emergencia de las tecnologías digitales ha catalizado profundas transformaciones materiales y simbólicas en las formas en que el conocimiento se produce, distribuye y valida, constituyendo lo que se puede denominar acertadamente como una “nueva gramática del conocimiento”. En palabras de Ursua (2014), este nuevo o al menos renovado marco epistemológico, trasciende la mera dimensión instrumental de las herramientas tecnológicas, manifestándose en cambio como modos distintos de pensamiento que reconfiguran nuestra arquitectura cognitiva y la relación cotidiana con la información.

Como argumenta Ursua (2014), el uso de tecnologías de la información y la comunicación, ejemplificado por los sistemas de internet, está transformando radicalmente las formas de conocer y el acto mismo de la cognición, lo que requiere una epistemología adecuada para el mundo digital, ya que las estructuras y categorías tradicionales de la teoría del conocimiento clásico, ya no son suficientes para abordar las dinámicas informativas contemporáneas. Definitivamente, el ámbito digital introduce formas y experiencias intersubjetivas sin precedentes de adquisición de conocimiento mediado que desafían las nociones convencionales de experiencia, verificación y certeza, lo que nos lleva a reconsiderar los fundamentos de la autoridad epistémica.

En este orden de ideas, los desafíos epistemológicos que plantea la sociedad digital se extienden más allá de cuestiones de acceso a la información para abarcar preguntas complejas sobre la construcción, validación e integración del conocimiento dentro de los paradigmas existentes. Según refiere Ingvarsson (2021), la epistemología digital implica que cuestionemos críticamente cómo las herramientas y expresiones digitales en diferentes momentos históricos generan efectos cognitivos y

artísticos distintos y, al mismo tiempo, examinemos si la fascinación teórica contemporánea con la materialidad (materialismo neoempirista) representa una respuesta final a la creciente digitalización.

Este ejercicio para determinar más allá de toda duda razonable como podemos conocer el mundo digital en el que estamos inmersos, requiere un examen crítico de cómo el conocimiento mediado digitalmente altera las categorías epistémicas tradicionales como la evidencia, el testimonio, la justificación y la verdad, mientras simultáneamente crea o recrea nuevas formas de inteligencia colectiva y cognición socializada que operan según principios lógicos diferentes. Y es que, la naturaleza omnipresente de las tecnologías digitales reconfigura nuestro paisaje epistemológico al difuminar las fronteras entre el conocimiento experto y el lego, los contextos de aprendizaje formal e informal y a distancia (Nikitenko, et al., 2024), y los procesos de producción de conocimiento individual y colectivo, tal como sugiere Barroso Jerez (2013) al afirmar que:

El conocimiento humano es una propiedad emergente que supera la cantidad y característica de las informaciones que procesa cada individuo. Para construir conocimiento el individuo ha de poseer competencias para dotar de interpretación a las informaciones y convertirlas en información significativa. En este proceso, la percepción del contexto en que se producen o adquieren informaciones juega una función necesaria para establecer el grado de validez de los posibles significados atribuibles a cada información. (2013, p. 63)

En este hilo conductor, el objetivo central de esta investigación fue problematizar y debatir filosóficamente los desafíos epistemológicos que enfrentan las nuevas gramáticas del conocimiento, en su relación dialéctica con las tecnologías digitales. Como es normal junto a este objetivo surgen preguntas críticas, tales como: ¿Cómo reconfiguran las tecnologías digitales la relación entre el productor y el consumidor de conocimiento? ¿Qué elementos constituyen la autoridad epistémica en entornos de información en red? Y ¿Cómo podríamos desarrollar criterios adecuados para la validación del conocimiento en contextos caracterizados por la abundancia de información, la mediación algorítmica y diversas comunidades de conocimiento?

En un primer momento conviene aclarar que, tal como sostiene Gutiérrez (2013), el compromiso ético que subyace a esta investigación reconoce que la producción y difusión del conocimiento en contextos digitales, no pueden separarse de cuestiones de acceso social a los saberes, poder y justicia. El trabajo científico genera fuentes de información a través de muestras, datos, resultados o escritura de código como software, lo que crea un imperativo ético para que todos los participantes en la investigación científica compartan las fuentes de información de manera oportuna, de ahí documentos como la llamada Declaración de Berlín para el Acceso Abierto del Conocimiento, suscrita en su momento por los autores de esta investigación filosófica (Science Europe Principles on Open Access to Research Publications, 2015)

Esta investigación reconoce que los marcos epistemológicos nunca son neutrales, sino que incorporan valores y sesgos específicos que privilegian ciertas formas de conocer mientras marginan otras (Foucault, 2002). En consecuencia, el presente trabajo adopta una postura reflexiva hacia sus propios enfoques metodológicos, reconociendo las formas en que las herramientas digitales configuran los procesos y resultados de la investigación, mientras simultáneamente aboga por ecosistemas de conocimiento equitativos que democratizan el acceso a la información y las herramientas para la producción de conocimiento. De ahí que, la única objetividad posible implique, ontológicamente, el reconocimiento de la subjetividad asumida en los investigadores, conscientes de sus gustos y preferencias.

Siguiendo los criterios de Foucault (2002), sobre el alcance y significado de la arqueología del saber, esta investigación se basa en la arqueología de los medios, la fenomenología de la tecnología, los estudios críticos de datos, los estudios de plataformas y la sociología del conocimiento (Ritzer, 1993), para proporcionar una comprensión multifacética de la epistemología digital. Pensamos que, este compromiso interdisciplinario permite trascender el determinismo tecnológico simplista o el relativismo cultural, reconociendo en cambio la constitución mutua de los sistemas tecnológicos y los discursos y prácticas del conocimiento en diversos contextos, mientras se presta atención a las dimensiones materiales, sociales e históricas de la producción del conocimiento digital.

Este artículo se desarrolla a través de varias secciones interconectadas que problematizan progresivamente la relación entre las tecnologías digitales y las gramáticas del conocimiento. Siguiendo esta introducción, la segunda sección establece un marco teórico basado tanto en la epistemología clásica como en la teoría digital contemporánea, para articular conceptos clave que permiten comprender el tema y sus fenómenos constitutivos. La tercera sección, describe la metodología. Por su parte, la cuarta sección, analiza y discute los principales resultados de la investigación. A modo de conclusión, la sección final sintetiza nuestras ideas para proponer orientaciones para futuras investigaciones y prácticas en la navegación de los desafíos epistemológicos de la sociedad digital.

FUNDAMENTOS TEÓRICOS

La epistemología clásica se centra en la teoría del conocimiento (Dancy, 1993), analizando desde diferentes puntos de vista cómo se adquiere y valida el conocimiento en un tiempo y espacio determinado. En este contexto, la “gramática del conocimiento” se refiere a las reglas y estructuras que gobiernan la producción y comprensión del conocimiento. Las tecnologías digitales, por otro lado, han transformado radicalmente estas dinámicas cognitivas al introducir nuevas formas de adquisición y distribución de información. Por estos motivos, según Ingvarsson (2021), la epistemología digital examina cómo las tecnologías digitales condicionan la forma en que se adquiere conocimiento, considerando tanto las circunstancias sociales como culturales en las que se generan las creencias y la circulación de la información. El programa de la epistemología digital consiste en:

What comparative literature and the humanities as a whole must do, in order to operate within this paradigm of digital epistemology, is, if not to replace, then at least to supplement meaning content and interpretation with materiality and composition. As Ingvarsson argues, “juxtapositions constitute the pedagogical core of digital epistemology” ... The objective may seem to be to fundamentally challenge the curriculum of comparative literature, arguing a shift from a practice based on provenance and causal relationships to the spatial relations of the principle of pertinence: from interpretation to juxtaposition; from meaningful content and distance to materiality and presence. (Ingvarsson, 2021.p IX)

En este orden de ideas, la era digital plantea varios desafíos epistemológicos entre los que destacan desde nuestro punto de vista:

- 1) La abundancia de información genera problemas de verificación y validación del conocimiento.
- 2) La mediación algorítmica cuestiona la autoridad epistémica tradicional al introducir formas automatizadas de conocimiento.

- 3) La interacción entre lo analógico y lo digital desafía las nociones tradicionales de experiencia y cognición. De modo que, estos desafíos requieren una reevaluación crítica de cómo se construye y se entiende el conocimiento en entornos digitales.

En completa consideración sobre el alcance y sentido de estos desafíos, siguiendo los lineamientos reflexivos de Russell (2002) y de Popper (1986), el programa filosófico para las nuevas gramáticas del conocimiento en un mundo digital implica una reflexión profunda sobre cómo las tecnologías digitales reconfiguran los marcos epistemológicos tradicionales. Lo que incluye examinar cómo las plataformas digitales y las redes sociales transforman la producción y difusión del conocimiento, así como la indagación hermenéutica y fenomenológica de cómo las comunidades en línea generan nuevas formas de inteligencia colectiva. Conjuntamente, se debe considerar cómo estas transformaciones epistémicas afectan la relación entre el conocimiento y la realidad social, cultural y política.

Lo realmente importante de todos estos cambios y transformaciones que diluyen la frontera entre lo individual y colectivo, es que, por su naturaleza diferencial, la era digital, a través de prácticas y discursos relacionados con la inteligencia artificial, los algoritmos y el transhumanismo, pueden transformar ontológicamente la condición humana, marcando un antes y después en la historia tal como supone Noah Harari (2014).

En la realidad actual, muchas tecnologías no solo alteran cómo percibimos y nos relacionamos con el mundo, sino que también cuestionan los límites entre lo humano y lo tecnológico. Este fenómeno sociológico plantea entonces la necesidad de desarrollar nuevas formas de comprender el mundo en términos simbólicos y culturales, considerando cómo las tecnologías digitales están redefiniendo lo que significa ser humano en un modelo de sociedad cada vez más mediado por la tecnología.

En síntesis teórica, la investigación sobre las gramáticas del conocimiento en la era digital requieren una comprensión profunda de los desafíos epistemológicos y las transformaciones ontológicas que están ocurriendo, como condición de posibilidad para comprender todas las implicaciones de la evolución de la tecnología digital de la revolución industrial de 4G a 5G, en el contexto de los retos de la globalización (Voronkova, et al., 2023). Esto implica reflexionar sobre cómo las tecnologías digitales están reconfigurando la producción, validación y distribución del conocimiento, así como sobre cómo estas transformaciones afectan nuestra comprensión de la realidad y de la condición humana.

En este orden de reflexiones, al mismo tiempo teóricas y metodológicas, en el marco de una disciplina en formación como lo son las “nuevas gramáticas del conocimiento”, quedan abiertas preguntas sobre cómo abordar estos desafíos de manera que se promuevan prácticas epistemológicas más inclusivas y reflexivas en un mundo cada vez más digitalizado. Preguntas como: ¿Cómo influyen las tecnologías digitales en la producción del conocimiento científico en el mundo de hoy? ¿Qué desafíos epistemológicos específicos enfrenta la era digital? ¿Cómo se articulan las diferentes gramáticas del conocimiento en un mundo digital basado en la interconexión de experiencias objetivas y subjetivas? ¿Qué impacto antropológico tiene la inteligencia artificial en la condición humana? O ¿Cómo se transforma la ontología humana con la digitalización de la realidad? Estas y otras preguntas similares requieren de un esfuerzo interdisciplinario de investigación y reflexión como condición de posibilidad para ofrecer algunas respuestas útiles, mientras tanto no hay modelos ni saberes concluyentes sobre el tema.

METODOLOGÍA

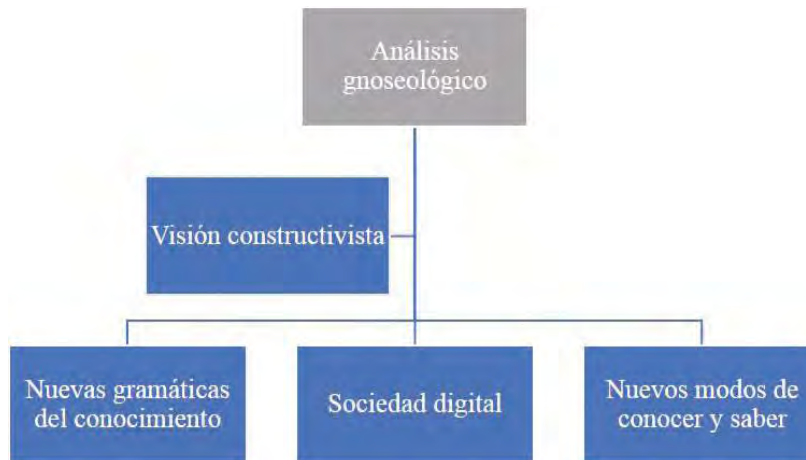
La presente investigación desarrolla, grosso modo, un análisis epistemológico centrado en las nuevas gramáticas del conocimiento en la era digital, explorando en cada momento, desde múltiples perspectivas, las relaciones entre el ser y el conocer en el complejo panorama actual. En palabras de Ursua (2014), este enfoque metodológico reconoce que el uso de las tecnologías de la información y comunicación está transformando de manera radical y totalmente nueva las maneras y formas de conocer y, hasta el mismo acto del conocer, lo que requiere, a su vez, una nueva epistemología adecuada al mundo digital. Por estas razones, el presente estudio postula que las expresiones y fenómenos digitales no se analizan meramente por sus beneficios técnicos, sino, además, por cómo se relacionan con la producción del conocimiento en general en nuestra época (Foucault, 2002), exigiendo a los epistemólogos categorías renovadas para comprender la realidad tecnológicamente mediada y sus implicaciones epistemológicas.

Dada la esencia del tema, esta investigación adopta una visión constructivista del conocimiento para explicar cómo se reproducen los saberes en la era digital, considerando que la teoría constructivista se enfoca en la construcción del conocimiento a través de actividades basadas en experiencias intersubjetivas en contexto. En palabras de Allen (2022), por lo general, el constructivismo ofrece un paradigma pertinente para esta nueva era de información, motivado por las tecnologías emergentes que permiten a los estudiantes no solo acceder instantáneamente a información ilimitada, sino también controlar la dirección de su propio aprendizaje.

Para autores como Verkhovod *et al* (2024), pensando en el sistema de factores de adaptabilidad del conocimiento en la esfera social de Ucrania, la metodología constructivista reconoce que las formas digitales de expresión afectan sustancialmente cómo vemos y procesamos la información, transfigurando en cada instante los procesos de enseñanza-aprendizaje y requiriendo, simultáneamente, de un abordaje holístico desde la perspectiva del aprendizaje constructivo, tal como lo propone Berrara (2010).

En términos operativos de la acción indagatoria, el desarrollo metodológico de este trabajo se estructuró en tres (3) etapas interconectadas: primero, se adelantó una revisión exhaustiva de literatura sobre epistemología digital y teorías constructivistas en inglés y en español; segundo, se hizo un análisis crítico de las perspectivas epistemológicas fundamentales (objetivismo, construccionismo y subjetivismo) en el contexto digital; tercero, se logró una fase interpretativa para identificar patrones emergentes y formular conclusiones. Como señala Doubront (2021), esta renovada mirada reconoce que una perspectiva epistemológica es, en último término, una forma de comprender y explicar cómo conocemos lo que sabemos, lo que permite predecir o responder hasta cierto punto ¿Qué tipo de conocimiento obtendremos en una investigación? y ¿Qué características tendrá ese conocimiento?, preguntas por lo demás esenciales para navegar el complejo territorio de la epistemología digital.

CUADRO 1. Arquitectura metodológica y epistemológica de la investigación.



Fuente: Elaboración propia (2025).

Al juicio de los autores, las limitaciones de esta investigación se manifiestan tanto en el plano objetivo como subjetivo. Desde lo objetivo, enfrentamos la rápida evolución de las tecnologías digitales que dificulta establecer marcos conceptuales estables, pues como señala Ingvarsson (2021), la epistemología digital conforma profundas reflexiones acerca de lo digital (y más allá), y no únicamente un esfuerzo intelectual por ampliar su espectro de aplicación en términos textuales o teóricos.

En el ámbito subjetivo, existe la dificultad de mantener distancia crítica frente a tecnologías que utilizamos cotidianamente, así como los sesgos interpretativos (condicionamiento social del conocimiento) al analizar fenómenos digitales desde marcos conceptuales desarrollados para entornos pre-digitales. Adicionalmente, la investigación enfrenta el desafío de integrar perspectivas cognitivas diversas sobre la relación entre tecnología y conocimiento, especialmente cuando la educación del siglo XXI requiere, tal como afirman Klopov et al (2023), la armonización dialéctica y dialógica de las propuestas del modelo constructivista y así aprovechar las oportunidades que ofrecen las Tecnologías de la Información y la Comunicación en la educación digital, entre otros ámbitos del ser y del hacer cotidiano.

ANÁLISIS Y DISCUSIÓN DE RESULTADOS

La presente sección es el resultado de un ejercicio dialógico que involucró hermenéuticamente tanto a los autores del estudio como a las fuentes documentales recopiladas. Desde una perspectiva hermenéutica, estas fuentes actúan como interlocutores válidos en la relación que se da entre texto y contexto, permitiendo una interpretación reflexiva de los datos y conceptos. En palabras de Seligman (2013), la visión dialéctica reconoce que el conocimiento no es un producto aislado, sino el resultado de un diálogo continuo entre los investigadores y los materiales analizados, lo cual enriquece los criterios y argumentos presentados en cada estudio. En este sentido, esta sección y las conclusiones aquí expuestas, reflejan con límites difusos tanto las interpretaciones colectivas de los autores como las interacciones con las fuentes documentales seleccionadas.

Llegados a este punto preguntamos entonces ¿Cómo reconfiguran las tecnologías digitales la relación entre el productor y el consumidor de conocimiento? Todo sugiere que, las tecnologías digitales han reconfigurado profundamente la relación entre el productor y el consumidor de conocimiento, transformándola en una interacción más dinámica e interconectada a escala global.

Según Piccinini, Wayne y Kolbe (2015), la densidad digital y la centralidad del consumidor son factores clave en esta transformación, ya que los consumidores ahora participan activamente en la creación y difusión del conocimiento mediante plataformas digitales. Este cambio ha desdibujado las líneas tradicionales entre productores y consumidores, generando un modelo de co-creación epistémica donde ambos roles se entrelazan. Sin embargo, esta interacción también plantea desafíos relacionados con la calidad y la autoridad del conocimiento producido en líneas generales, de modo que no se puede confundir calidad con cantidad y disponibilidad.

En los dominios de la sociedad digital ¿Qué elementos constituyen la autoridad epistémica en entornos de información en red? Todo parece indicar que, en el mundo actual interconectado, la autoridad epistémica en entornos digitales se configura mediante una combinación de factores tradicionales y emergentes. Para autores como Leiter (2024), mientras que instituciones académicas y científicas como las universidades o centros de investigación continúan siendo referentes clave, nuevos agentes como “*influencers*”, redes de producción colaborativa y tecnologías como la inteligencia artificial han adquirido una relevancia inusitada. Por lo tanto, la autoridad epistémica depende críticamente de normas sociales confiables que determinen “a quién creer sobre qué”, pero estas normas están siendo erosionadas por la fragmentación del ecosistema informativo digital. Por consiguiente, la legitimidad epistémica debe adaptarse a este nuevo entorno supra-postmoderno.

Ante la pregunta ¿Cómo podríamos desarrollar criterios adecuados para la validación del conocimiento en contextos caracterizados por la abundancia de información, la mediación algorítmica y diversas comunidades de conocimiento? Se debe afirmar decididamente que, los criterios adecuados para validar el conocimiento en contextos digitales requieren de un enfoque multidimensional guiado por el pensamiento crítico. Siguiendo la epistemología de Kasinath y Armstrong (2007), esto incluye protocolos claros para verificar fuentes, evaluar consistencia y autenticidad, así como fomentar habilidades críticas en los usuarios para discernir información confiable. Según la naturaleza de cada formato, garantizar la “seguridad informativa” implica no solo recopilar datos precisos y útiles, sino también, establecer mecanismos legales y cognitivos consistentes de verificación para evitar la propagación de información errónea. De modo que, el uso de herramientas tecnológicas puede complementar estos procesos al automatizar parte del análisis crítico necesario.

Finalmente, cuando se pregunta ¿Qué argumentos permiten problematizar y debatir filosóficamente los desafíos epistemológicos que enfrentan las nuevas gramáticas del conocimiento, en su relación dialéctica con las tecnologías digitales? No cabe duda de que estos desafíos pueden ser problematizados filosóficamente desde varias perspectivas metodológicas, tales como: la hermenéutica, el análisis del discurso o la fenomenología.

Sea como sea, primero, se debe considerar cómo las tecnologías digitales transforman las categorías tradicionales del saber al introducir nuevas formas de mediación algorítmica (Aryal, 2023). Segundo, resulta necesario debatir sobre el impacto ético y social de estas transformaciones, particularmente en términos de acceso equitativo al conocimiento. Finalmente, se debe reflexionar sobre cómo estas gramáticas pueden integrar enfoques interdisciplinarios para abordar problemas complejos que trascienden los límites disciplinarios tradicionales.

Desde otra perspectiva más filosófica, estos desafíos también pueden analizarse a través del concepto de “régimen digital”, que describe cómo las condiciones tecnológicas influyen en la producción académica del conocimiento. Este régimen plantea preguntas críticas sobre cómo las herramientas digitales afectan nuestra capacidad para generar ideas originales y mantener estándares académicos rigurosos. Como señala Aryal (2023), el régimen digital actúa tanto como un suplemento a nuestras capacidades cognitivas como una amenaza potencial a nuestra autonomía intelectual, si no se gestiona adecuadamente.

CUADRO 2. Programa epistémico de las nuevas o renovadas gramáticas del conocimiento en la sociedad digital.

Objetivos	Desafíos	Teorías	Limitaciones
Democratizar el acceso al saber.	Abundancia informativa (Big Data).	Hermenéutica.	Evolución tecnológica constante.
Validar conocimiento digital.	Mediación algorítmica.	Constructivismo.	Sesgos interpretativos.
Promover epistemologías inclusivas.	Interacción analógico-digital.	Régimen digital (Stiegler).	Fragmentación social del ecosistema informativo.

Fuente: Elaborado por los autores (2025).

Como comentario adicional, el cuadro 2 sintetiza los principales elementos analizados en esta investigación: objetivos, desafíos epistemológicos, teorías aplicadas y limitaciones enfrentadas por las gramáticas del conocimiento. Los objetivos reflejan aspiraciones hacia una mayor democratización e inclusión epistémica de los actores del conocimiento; los desafíos destacan problemas inherentes a la era digital. Por su parte, las teorías ofrecen marcos interpretativos para abordar estos problemas junto a sus fenómenos constitutivos y, finalmente, las limitaciones subrayan obstáculos materiales o simbólicos, tanto técnicos como conceptuales que deben superarse. Esta disquisición invita a reflexionar sobre cómo equilibrar innovación tecnológica con prácticas epistemológicas responsables, bien avanzado el siglo XXI.

CONCLUSIONES Y RECOMENDACIONES

Desde todo punto de vista, el futuro de las gramáticas del conocimiento en la sociedad digital se perfila como un campo de estudio en constante evolución, donde convergen múltiples teorías, metodologías y perspectivas epistemológicas. La pluralidad de estas gramáticas responde a la necesidad de articular distintos abordajes teóricos que consideran, tal como afirma Morán (2022), el conocimiento y las creencias epistémicas en relación con la información a partir del uso de internet, surgiendo como respuesta a las demandas para procesar la abundancia informativa frente a las limitaciones de las nociones tradicionales del conocimiento.

Esta diversidad de miras refleja la complejidad del espacio digital como terreno de investigación, donde lo analógico y lo digital se entrelazan formando una realidad integrada u “onlife”, que demanda nuevas categorías de análisis y de formas de comprensión. La epistemología digital, en este contexto, no se limita a expandir su espectro de aplicación, sino que conforma profundas reflexiones acerca de lo digital que trascienden el mero estudio de sus beneficios técnicos.

En este orden de ideas, uno de los desafíos más prominentes para la epistemología contemporánea es la superabundancia informativa propia del Big Data, que complica significativamente los procesos de verificación y validación del conocimiento. Por estas razones, la epistemología digital apunta precisamente a la conjunción de factores que implica el conocimiento en redes, en la interactividad del sujeto cibernético con el mundo de las redes ciberespaciales, espacio virtual en donde la verdad hay que procesarla y construirla en ese mundo virtual y no en lo real, como se hacía en épocas anteriores. ¿Pero qué es lo real?

Siguiendo a Martínez (2004), este cambio en el locus de la construcción de la verdad requiere nuevos criterios y metodologías para establecer la validez de las afirmaciones en entornos donde las fuentes se multiplican exponencialmente y las autoridades tradicionales pierden centralidad, lo que da paso a una nueva racionalidad científica. Metafóricamente hablando, La “tormenta digital de datos e informaciones” exige capacidades renovadas para navegar, filtrar y evaluar críticamente el caudal informativo que caracteriza a nuestra época, transformando radicalmente en todo momento los procesos de construcción social del conocimiento y ensanchando constantemente los límites de los que podemos saber y conocer con alguna certeza.

Tal como sostiene Merejo (2015), la mediación algorítmica representa un segundo desafío crucial al cuestionar la autoridad epistémica tradicional, mediante la introducción de formas automatizadas de generación y validación del conocimiento, tales como la emergencia de diferentes inteligencias artificiales. Este fenómeno trasciende la observación individual porque ha estado configurándose redes de trabajadores del conocimiento, que son las que producen los nuevos saberes que se mueven en las “cibercosas”, en las múltiples conexiones del internet de las cosas, en las comunidades de investigaciones, en los centros de informaciones profesionales y en las capturas y aceleración de datos.

En la sociedad digital, los algoritmos no solo filtran y organizan la información, sino que participan activamente en la creación de marcos interpretativos que condicionan nuestra comprensión de la realidad, desplazando parcialmente el juicio humano en favor de sistemas automatizados. Este desplazamiento hermenéutico y cognitivo en la condición humana, plantea interrogantes sustanciales sobre la autonomía epistémica y los criterios de validación en entornos donde las decisiones algorítmicas operan con creciente autonomía y opacidad. En términos políticos ¿podemos imaginar desde ya que las revoluciones venideras serán encauzadas por actos y discursos de rebelión epistemológica y desobediencia cognitiva ante los saberes hegemónicos que produce y reproduce la red global? Es probable.

Siguiendo con los aportes de Morán (2022), el tercer desafío epistemológico emerge de la compleja interacción entre lo analógico y lo digital, que desestabiliza en los imaginarios colectivos las nociones tradicionales de experiencia y cognición. En palabras de Doubront (2021), la epistemología digital estudia precisamente cómo las tecnologías digitales condicionan la forma objetiva y subjetiva mediante la cual se produce y adquiere el conocimiento, pero también las circunstancias sociales y culturales en las que se generan algunas creencias y se determina la circulación de la información, a través de la interacción continua y compleja entre el espectro analógico y el digital.

Desde el punto de vista epistemológico, esta dinámica exige repensar las categorías de presencia, temporalidad y espacialidad que han estructurado tradicionalmente nuestra relación con el conocimiento en un sentido amplio, generando nuevas formas de experiencia mediada que reconfiguran los procesos cognitivos. En consecuencia, la distinción entre “el espacio de los lugares” y

“el espacio de los flujos” del que nos habla Morán (2022), pone en evidencia cómo las tecnologías digitales habilitan en cada momento la posibilidad tecnológica y organizativa de practicar la simultaneidad sin contigüidad, transformando radicalmente los modos de acceso y producción del conocimiento en general.

Ante estos desafíos, se recomienda a investigadores y filósofos interesados en el tema adoptar enfoques transdisciplinarios que integren perspectivas epistemológicas, tecnológicas, sociales y éticas. En este contexto, es esencial promover el acceso abierto al conocimiento como parte de una estrategia más amplia de democratización epistemológica, reconociendo que este paradigma “llegó para quedarse” y que debemos “pensar cuidadosamente qué tipo de sistema internacional queremos crear para comunicar la investigación científica” (Science Europe Principles on Open Access to Research Publications, 2015). Por todas estas circunstancias, resulta imperativo desarrollar marcos conceptuales que permitan comprender las nuevas formas de validación y circulación del conocimiento en entornos digitales, así como fortalecer las capacidades críticas de los ciudadanos frente a la información. Por su parte, las instituciones académicas deben transitar hacia “nuevos formatos de divulgación en entornos virtuales” y apoyar la creación de repositorios digitales que garanticen el acceso universal al conocimiento como bien público.

El avance vertiginoso de la sociedad digital cuestiona progresivamente la legitimidad de los saberes humanísticos como la historia y la filosofía, poniendo en entredicho sus aportes mientras privilegia el desarrollo tecnológico y las ciencias exactas ya que se adaptan mucho mejor a las economías abiertas movidas por el afán de lucro como principio rector de la vida social (Nussbaum, 2016). Este desequilibrio refleja una tensión epistemológica profunda entre distintas formas de conocimiento y sus respectivos criterios de validación y, más aún, entre el lucro y la libertad para ser y conocer el mundo natural y cultural.

Todas las transformaciones mencionadas a lo largo de esta investigación que dan cuenta del avance de la sociedad digital no deben ser valoradas a priori de forma negativa, toda vez que, estas transformaciones no deben conducir, necesariamente, a una marginación categórica de las humanidades, sino a un diálogo fecundo entre distintas tradiciones epistemológicas que permita enriquecer nuestra comprensión de la realidad digital. Los saberes humanísticos aportan perspectivas críticas y reflexivas indispensables para orientar el desarrollo tecnológico, hacia fines que promuevan el bienestar humano y la justicia social y esto es lo que busca, en última instancia, las diversas gramáticas del conocimiento afincadas en la necesidad ontológica de expansión del potencial intelectual de la humanidad (Trusova, et al., 2021)

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ARTÍCULO DE INVESTIGACIÓN

Factores socioeconómicos que condicionan la motivación y el crecimiento profesional del profesorado universitario

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Resumen. El objetivo de este estudio fue examinar los factores socioeconómicos que influyen en la motivación de los profesores universitarios en sus actividades profesionales. El estudio también analizó los mecanismos y estrategias para incrementar la motivación docente con foco en mejorar su efectividad, satisfacción laboral y desarrollo profesional. El estudio utilizó un enfoque analítico, análisis funcional-estructural, análisis comparativo, evaluación de expertos y métodos de recomendaciones prácticas para recopilar y analizar datos. Basándose en una revisión de la literatura y datos empíricos, el estudio identificó estrategias clave para mejorar la motivación del personal docente, entre ellas: ofrecer salarios competitivos que sean acordes a las cualificaciones y la carga de trabajo; la introducción de diversas formas de incentivos financieros, como bonificaciones por publicación, becas de investigación, remuneración basada en la antigüedad y bonificaciones relacionadas con la acreditación; Fomentar la motivación no monetaria a través de oportunidades de avance profesional, premios formales, acceso a programas de desarrollo profesional y recursos académicos; crear un entorno social favorable a través de iniciativas de intercambio, programas de investigación financiados por la universidad y cooperación intrainstitucional; mejorar las condiciones de trabajo

mediante la modernización de las aulas y los laboratorios y la provisión de zonas de descanso cómodas; y la introducción de modelos de empleo flexibles que permitan al profesorado combinar actividades de docencia e investigación. Se espera que la implementación de estas medidas aumente la competitividad de la universidad, reduzca la rotación de personal y cree condiciones favorables para el crecimiento profesional del personal investigador y docente.

Palabras clave: motivación del profesorado universitario, institución de educación superior, motivación financiera, motivación no financiera, motivación social.

Socio-economic factors shaping the motivation and professional growth of university faculty

Abstract. The purpose of this study was to examine the socio-economic factors influencing the motivation of university faculty in their professional activities. The study also analyzed mechanisms and strategies for enhancing faculty motivation, with a focus on improving their effectiveness, job satisfaction, and professional development. To collect and analyze data, the study employed an analytical approach, functional-structural analysis, comparative analysis, expert evaluation, and practical recommendation methods. Based on a review of literature and empirical data, the study identified key strategies for enhancing faculty motivation, including: ensuring a competitive salary aligned with qualifications and workload; introducing various forms of financial incentives such as publication bonuses, research grants, seniority-based pay, and accreditation-related bonuses; promoting non-monetary motivation through career advancement opportunities, official awards, access to professional development programs, and academic resources; fostering a supportive social environment through experience-sharing initiatives, university-funded research programs, and intra-institutional collaboration; improving working conditions by modernizing classrooms, laboratories, and providing comfortable rest areas; and implementing flexible employment models that allow faculty to balance teaching and research activities. The implementation of these measures is expected to enhance university competitiveness, reduce faculty turnover, and create favorable conditions for the professional growth of academic staff.

Keywords: University faculty motivation, higher education institution, financial motivation, non-financial motivation, social motivation.

INTRODUCTION

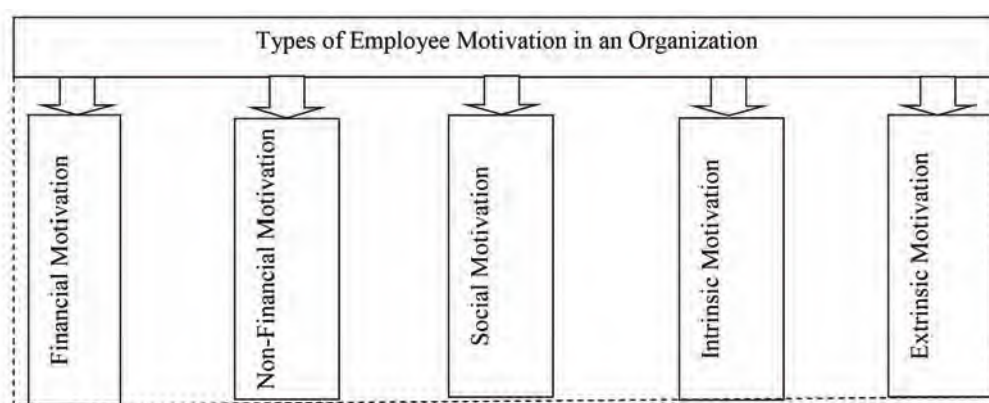
The motivation of university faculty plays a crucial role in improving their productivity, fostering professional growth, and enhancing the quality of the discipline curriculum. Properly motivated university faculty are more committed to lesson preparation, which, in turn, positively influences the professional training of students (Tomashevs'ka, 2023). A significant factor in increasing faculty motivation is the encouragement of research and scientific activities (Altamirano, 2024). Participation in research projects not only fosters interest in securing research grants through competitive tenders but also boosts faculty members' publication activity and their engagement in academic conferences.

Enhancing faculty motivation helps address the issue of high staff turnover, increases job satisfaction, and fosters a stable academic workforce by ensuring continuity within university teams (Samborska et al., 2023). Well-motivated faculty also contribute to building a positive institutional reputation, which, in turn, attracts prospective students (Rubia et al., 2023).

A motivated academic workforce fosters a creative work environment and promotes a supportive and collaborative atmosphere within the institution (Urdabayev et al., 2024). Effective motivation strategies also enhance the competitiveness of the educational services offered by universities.

In their research, authors (Sindisiwe et al., 2023) identify several key types of employee motivation (Figure 1).

Figure 1. Types of employee motivation in an organization



Source: Compiled according to Sindisiwe et al., 2023.

Financial motivation for university faculty should include fair and competitive compensation that corresponds to their workload, as well as various bonuses and incentives for publishing scientific papers, securing research grants, and implementing research projects (Samko, 2023). Additional financial incentives may include seniority-based salary increments, financial assistance for personal or family-related circumstances, as well as reimbursement for transportation costs and housing expenses (Puja et al., 2023).

Non-financial motivation for university faculty includes opportunities for career advancement, official recognition and awards, access to research fellowships, and participation in scientific conferences. Additionally, creating a comfortable working environment, fostering conditions for creative self-fulfillment, and ensuring institutional support for faculty members' professional responsibilities are essential factors in non-financial motivation (Venkatesh et al 2023).

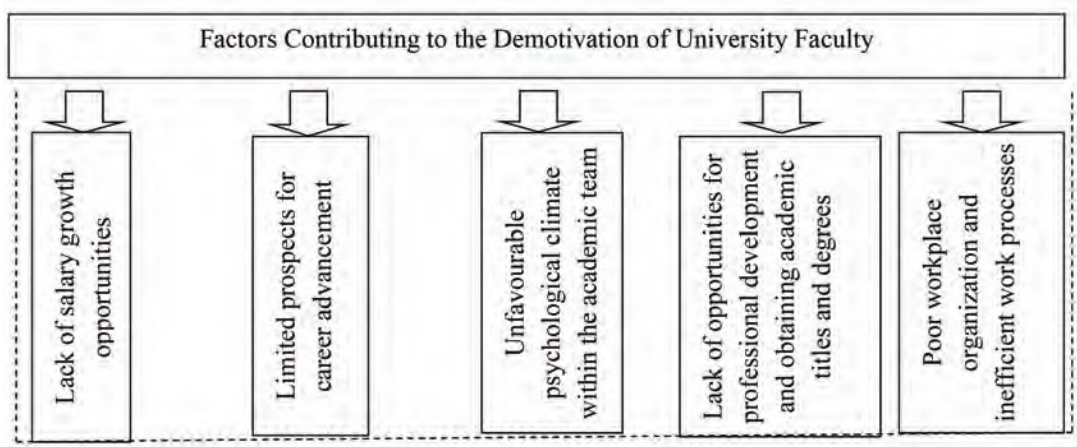
Social motivation in the workplace may involve organizing corporate events to foster team cohesion, facilitating participation in pension programs and health insurance plans, and providing wellness support for employees and their families.

Intrinsic motivation among university faculty includes personal satisfaction derived from fulfilling professional responsibilities, opportunities to participate in cutting-edge research projects, creative self-actualization, and the societal prestige associated with the academic profession (Venkatesh et al., 2021).

Extrinsic motivation factors include individual performance evaluation by university leadership, public recognition, and the availability of well-equipped workspaces (Kerry et al., 2021).

According to Tabachuk (2022), several key factors contribute to the demotivation of university faculty (Figure 2).

Figure 2. Factors contributing to the demotivation of university faculty



Source: Compiled according to Tabachuk, 2022.

Increasing societal and student expectations of universities, which often cannot be met due to limited financial resources, have a negative impact on faculty motivation (Wilson, 2024). Additionally, competition among universities in the higher education market, along with the opportunity for faculty to secure employment in business sectors offering more attractive salaries and working conditions, further diminishes university instructors' motivation.

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

Motivation plays a crucial role in enhancing faculty productivity, influencing both teaching quality and research output. Tomashevs'ka (2023) emphasizes the need for structured motivation management strategies in academic institutions, which can be extended to higher education settings. Her study identifies motivation as a critical factor for sustaining faculty engagement and improving institutional performance. Similarly, Samko (2023) analyzes the theoretical foundations of self-educational activities among faculty, underscoring the importance of continuous professional development in maintaining high teaching standards. A broader perspective on faculty motivation is provided by Tiwari & Chatterjee (2021), who explore how motivation affects individual productivity levels among teaching staff in private higher education institutions in India. Their findings suggest that a balanced approach, incorporating both financial and non-financial incentives, is essential for sustaining faculty motivation.

Several researchers emphasize the role of financial incentives in improving faculty motivation. Altamirano (2024) discusses the challenges faced by U.S. higher education institutions in a post-pandemic environment, particularly highlighting the need for competitive salaries and research funding to retain academic talent. In contrast, Puja & Chatterjee (2021) examine the impact of

financial motivation on faculty productivity, noting that salary structures, research grants, and performance-based incentives significantly contribute to academic engagement.

Beyond monetary rewards, Venkatesh (2023) explores job enrichment strategies as a non-financial motivational tool, demonstrating how enhanced job roles, professional autonomy, and leadership opportunities can lead to higher faculty satisfaction. The influence of institutional leadership and governance on faculty motivation has been widely studied. Rubia et al. (2023) examine transformational leadership styles in higher education institutions, concluding that effective leadership fosters greater organizational commitment and faculty motivation. Similarly, Kerry et al. (2023) explore how knowledge-sharing motivation and management support contribute to faculty engagement, emphasizing the importance of collaborative academic cultures.

METHODS

This study employs a mixed-methods approach, integrating both quantitative and qualitative research methods to analyze faculty motivation in higher education institutions. The research design is structured to examine key motivational factors and their impact on the productivity, job satisfaction, and professional development of university faculty members.

Research Design

The study follows an analytical and comparative research design, utilizing multiple methodologies to assess faculty motivation strategies. The primary methods include:

- 1) Analytical Method – A comprehensive review of literature sources related to faculty motivation in higher education was conducted. This included both theoretical models and empirical studies from international and domestic contexts to identify key motivational mechanisms and their effectiveness.
- 2) Functional-Structural Method – Faculty motivation was analyzed as a complex system composed of interconnected elements. The study categorized motivational factors based on intrinsic and extrinsic motivation, material and non-material incentives, and strategies to assess their collective impact.
- 3) Comparative Analysis – The study compared various approaches to faculty motivation across different higher education institutions globally. Best practices from leading universities were examined to determine effective models for improving faculty motivation and retention.
- 4) Expert Evaluation Method – Faculty and administrative personnel from two universities were surveyed and interviewed to assess motivation factors, barriers, and possible improvements in academic motivation strategies.
- 5) Survey Methodology – A structured questionnaire was developed to collect quantitative data from university faculty regarding their motivation, job satisfaction, and professional development opportunities. The survey focused on financial incentives, career advancement, work environment, and institutional support. Responses were analyzed using statistical methods, including descriptive and inferential analysis, to identify patterns and relationships between different motivational factors.

By utilizing a comprehensive methodological approach, this study aims to provide data-driven recommendations for enhancing faculty motivation strategies in higher education institutions. The results will contribute to improving faculty retention, productivity, and the overall quality of academic institutions.

Survey for assessing faculty motivation in professional activities:

Section 1: General Information

What is your age?

- ☐ Under 30 years
- ☐ 30–40 years
- ☐ 41–50 years
- ☐ Over 50 years

How many years have you worked in higher education?

- ☐ Less than 5 years
- ☐ 5–10 years
- ☐ 11–20 years
- ☐ More than 20 years

What is your current position?

- ☐ Assistant Lecturer
- ☐ Senior Lecturer
- ☐ Associate Professor
- ☐ Full Professor
- ☐ Administrative Role

What type of institution do you work at?

- ☐ Public university
- ☐ Private university
- ☐ Research institute
- ☐ Other (please specify)

How would you describe your current workload?

- ☐ Too low
- ☐ Moderate
- ☐ High
- ☐ Too high

How often do you work beyond your official working hours?

- ☐ Never
- ☐ Rarely
- ☐ Sometimes
- ☐ Often
- ☐ Always

Section 2: Financial Motivation

Is your salary sufficient to meet your financial needs?

- ☐ Yes, completely
- ☐ Somewhat sufficient
- ☐ Somewhat insufficient
- ☐ No, completely insufficient

Which financial incentives are most important to you? (*Select up to 3*)

- ☐ Salary increase
- ☐ Performance-based bonuses
- ☐ Grants and research funding
- ☐ Additional payments for teaching workload
- ☐ Financial support for conferences and travel
- ☐ Other (please specify)

How satisfied are you with the financial incentive system at your university?

(*Scale: 1 = Very dissatisfied, 5 = Very satisfied*)

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

Does your university offer performance-based financial rewards
(e.g., bonuses for research, teaching excellence)?

- ☐ Yes, regularly
- ☐ Occasionally
- ☐ No

Section 3: Career Growth and Professional Development

What factors are most important for your career growth? (*Select up to 3*)

- ☐ Opportunities for professional development
- ☐ Participation in international projects
- ☐ Earning academic degrees and titles
- ☐ Promotion to administrative roles
- ☐ Research collaborations and publications
- ☐ Other (please specify)

Does your university support your professional development
(e.g., funding for courses, internships, or research grants)?

- ☐ Yes, fully
- ☐ Partially
- ☐ No

How important is participation in scientific conferences and publishing in prestigious journals to you?

- ☐ Very important
- ☐ Somewhat important
- ☐ Somewhat unimportant
- ☐ Not important

Do you feel that career advancement at your university is based on merit?

- ☐ Yes, completely
- ☐ Somewhat
- ☐ Not really
- ☐ No

What barriers do you face in achieving career growth? (*Select all that apply*)

- ☐ Limited opportunities for promotion
- ☐ Lack of institutional support
- ☐ High competition for positions
- ☐ Insufficient funding for research
- ☐ Lack of time due to teaching workload
- ☐ Other (please specify)

Section 4: Non-Financial and Social Motivation

Which non-financial incentives do you find most valuable? (*Select up to 3*)

- ☐ Recognition of achievements (awards, certificates)
- ☐ Flexible work schedule
- ☐ Comfortable working conditions
- ☐ Team-building and corporate events
- ☐ Access to mentorship and coaching programs
- ☐ Other (please specify)

Do you feel valued and supported by university leadership?

- ☐ Yes, completely
- ☐ Somewhat
- ☐ Not really
- ☐ No

Does your university encourage collaboration and teamwork among faculty members?

- ☐ Yes
- ☐ Somewhat
- ☐ No

How satisfied are you with the availability of research resources (labs, funding, databases)? (*Scale: 1 = Very dissatisfied, 5 = Very satisfied*)

- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5

Do you feel you have a good work-life balance?

- ☐ Yes, completely
- ☐ Somewhat
- ☐ No, I often work overtime
- ☐ No, I feel constantly overworked

Does your university support mental health and well-being programs?

- ☐ Yes
- ☐ No

Section 5: Overall Motivation and Recommendations

On a scale of 1-10, how motivated do you feel in your current position? (*1 = Not*)

Rank the following motivation factors in order of importance (1 = Most Important, 5 = Least Important):

- ☐ Salary and financial benefits
- ☐ Career growth and promotions
- ☐ Recognition and awards
- ☐ Work environment and team support
- ☐ Research opportunities and funding

What could improve your motivation for teaching? (*Open-ended question*)

What changes would you suggest to improve the motivation system at your university? (*Open-ended question*)

This questionnaire will help to identify key factors of teacher motivation and identify areas for its improvement.

This survey aims to identify key factors influencing faculty motivation and suggest strategies for its improvement.

Practical Recommendation Method

Based on the findings of this study, concrete recommendations have been developed to enhance university motivational policies. Key recommendations include:

- Implementing flexible incentive systems tailored to the individual needs of faculty members.
- Improving university social policies to enhance working conditions and faculty well-being.
- Actively promoting research and scientific activities through grant funding and performance-based bonuses.

Creating opportunities for professional growth, such as advanced training programs, career development initiatives, and participation in international academic projects.

This study provides a deeper understanding of faculty motivation and its impact on teaching quality. The proposed recommendations can be applied in higher education institutions to improve the efficiency of the educational process and enhance faculty job satisfaction.

RESULTS

A review of the literature provides valuable insights into effective approaches for increasing faculty motivation in universities. The analysis of previous studies has allowed for a systematic classification of various motivation strategies applied in higher education institutions (Table 1).

TABLE 1. Measures to Enhance Faculty Motivation in Higher Education

Motivations	Measures to increase motivation
1. Financial Motivation	Competitive salary levels aligned with faculty qualifications and workload. Incentives for research achievements, including grants, academic publications, and earned titles or degrees. Bonuses and additional payments for seniority, program accreditation, and participation in research projects. Performance-based financial rewards for outstanding teaching and research contributions. Funding for professional development (e.g., conferences, training programs, study visits).
Financial support of academic activities	Internal university grants for young faculty members and doctoral researchers to encourage academic growth and research innovation. Partial reimbursement for transportation and meals, easing financial burdens and improving work conditions. Conference and publication funding to support faculty participation in national and international academic events
Career Development and Professional Growth	Opportunities for academic promotion and structured career advancement pathways Educational Programs for Experience Exchange (Faculty exchange programs with leading universities to promote cross-institutional collaboration and knowledge sharing; Joint academic projects that encourage interdisciplinary research and international cooperation; Workshops and training sessions led by experts to introduce best teaching and research practices; Sabbatical leave opportunities for faculty members to engage in advanced study, research, or professional development abroad. Regular training and professional development programs to enhance teaching and research skills.
Access to scientific and educational resources	Free access to databases and scientific literature Reduction of excessive administrative burdens, allowing faculty to focus on research and teaching

TABLE 1. Continuación

Motivations	Measures to increase motivation
Comfortable Working Conditions	Improvement of working conditions, including well-equipped research labs and modernized teaching spaces. Recognition programs (awards, honorary titles, certificates) for outstanding contributions. Modernized classrooms and research facilities equipped with up-to-date technology and resources. Well-maintained office spaces with adequate lighting, ventilation, and ergonomic furniture to enhance productivity.
2. Non-Financial Motivation	Recognition and awards – Acknowledgment of faculty achievements through certificates, honorary titles, and institutional awards. Access to professional development programs – Workshops, mentorship programs, and leadership training to enhance skills. Participation in decision-making – Involvement of faculty in university governance, strategic planning, and curriculum development. Workplace culture and psychological support – Fostering a positive and inclusive academic environment through teamwork, peer support, and mental well-being initiatives.
3. Social Support	Health and wellness programs – Access to medical insurance, psychological support, and well-being initiatives for faculty and their families. Retirement and pension benefits – Ensuring financial security through well-structured pension plans and social benefits. Team-building and corporate events – Organizing faculty retreats, cultural activities, and social gatherings to strengthen collegiality. Childcare and family support programs – Providing on-campus childcare facilities, parental leave policies, and family-friendly workplace initiatives. Housing and relocation assistance – Support for faculty in securing affordable housing or relocation subsidies for those moving to a new city.
4. Intrinsic Motivation	Sense of professional fulfillment – Encouraging faculty members to take pride in their teaching, research, and contributions to academic development. Opportunities for creative self-actualization – Providing autonomy in research topics, innovative teaching methods, and interdisciplinary projects Engagement in cutting-edge research – Allowing faculty to work on pioneering studies and collaborate with leading experts in their field. Intellectual challenge and personal growth – Offering stimulating academic environments where faculty can continuously learn and develop. Opportunities to mentor and inspire students – Creating rewarding teaching experiences where faculty can shape the next generation of professionals and researchers.
5. Extrinsic Motivation	External evaluation and feedback – Regular performance reviews with constructive feedback from peers, students, and administrators. Public acknowledgment and reputation – Opportunities to gain professional recognition through media, academic rankings, and institutional promotions. International exposure and collaborations – Invitations to prestigious conferences, faculty exchange programs, and global research partnerships.

Source: compiled according to authors own research.

To ensure faculty motivation and job satisfaction, universities should implement a competitive salary structure that reflects the quality of professional responsibilities, faculty qualifications, and market competition for academic talent. Additionally, various financial incentives should be introduced, including bonuses for securing research grants, publishing scientific works, and earning academic titles and degrees.

A seniority-based bonus system could also be beneficial, rewarding faculty for long-term service, program accreditation efforts, and contributions to research project development. To further promote faculty engagement in academic publishing, universities should allocate dedicated budgetary resources for conference participation and publication in prestigious scientific journals.

Supporting early-career researchers is crucial. Establishing internal university grants specifically for young faculty members and doctoral researchers can encourage innovation and long-term commitment to academia. Additionally, institutions should consider partial reimbursement for faculty transportation expenses and meal subsidies for on-campus dining, improving overall work-life balance.

For effective career advancement, universities must create opportunities for faculty to obtain academic titles and degrees. One effective approach is to develop educational programs focused on experience exchange between senior and junior faculty members. Special emphasis should be placed on professional development initiatives, including retraining courses, internships, and skill enhancement programs. These should not only cover subject-specific expertise but also emphasize modern pedagogical innovations and teaching methodologies.

To support faculty research and teaching effectiveness, universities must ensure free access to academic databases, scientific literature, and other essential resources. Furthermore, streamlining administrative processes is essential—reducing bureaucratic barriers and optimizing university documentation systems can significantly enhance faculty efficiency in both teaching and research activities.

Finally, improving working conditions and social infrastructure is critical. Universities should invest in modernized classrooms, well-equipped research laboratories, and designated areas for faculty rest and meals, ensuring a comfortable and supportive environment for academic work.

By implementing these measures, universities can foster a motivating and productive environment that enhances faculty performance, professional development, and institutional competitiveness.

To strengthen non-financial motivation among university faculty, institutions should regularly organize corporate events and actively promote the achievements of their researchers in mass media, including online platforms. Recognizing faculty members who contribute significantly to the university's development is essential. Various official acknowledgment forms, such as faculty honor boards, should be utilized to highlight academic excellence and institutional contributions.

Ensuring social stability within the university community is equally important. Universities should provide legal and financial assistance to employees facing difficult life circumstances. Additionally, organizing sports and wellness programs for faculty and their families can significantly enhance workplace morale and well-being.

Internal faculty organizations, such as university unions, can also play a crucial role in supporting academic staff by advocating for better working conditions and career advancement opportu-

nities. To stimulate research activity, universities should develop faculty-level and institution-wide grant programs and establish structured opportunities for pedagogical experience exchange among educators.

To enhance the university's external reputation, faculty members should be encouraged to participate in international research programs and projects. This not only elevates the university's global standing but also fosters professional growth and collaboration.

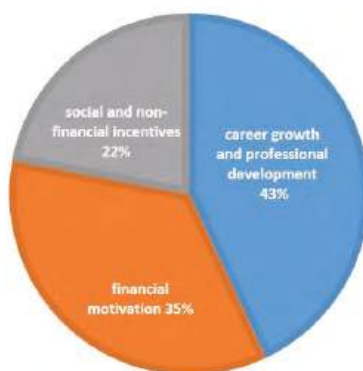
Given economic constraints, universities should prioritize non-financial incentives, such as implementing flexible work schedules and fostering effective student feedback mechanisms to recognize and reward teaching excellence.

Survey Results on Faculty Motivation. A faculty motivation survey conducted at Uzhhorod National University and Bohdan Khmelnytsky Melitopol State University yielded the following results:

- 43% of respondents indicated that career growth and professional development are their primary motivation.
- 35% emphasized financial motivation as a key factor.
- 22% highlighted social and non-financial incentives as important elements of their motivation (Figure 3).

These findings underscore the necessity of a balanced approach that integrates both financial and non-financial motivational strategies to enhance faculty engagement, job satisfaction, and overall academic performance.

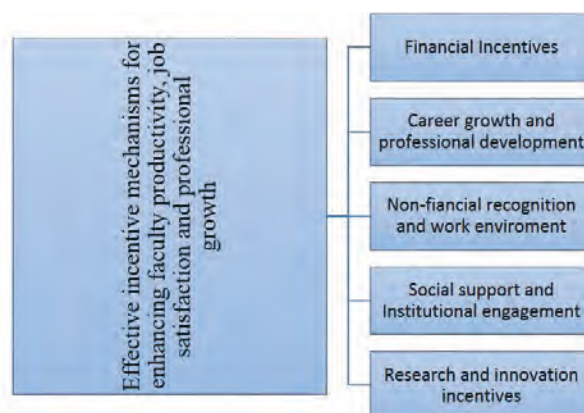
Figure 3. University Faculty Motivation for Professional Activities



Source: Compiled according to authors own research.

To enhance faculty motivation in universities, it is essential to implement effective incentive mechanisms that contribute to increased productivity, job satisfaction, and professional growth. These mechanisms should be strategically designed to foster both intrinsic and extrinsic motivation, ensuring long-term faculty engagement and institutional success (Figure 4).

Figure 4. Effective incentive mechanisms for enhancing faculty productivity, job satisfaction, and professional growth



Source: compiled according to authors own research.

1. Financial Incentives. Competitive financial rewards play a crucial role in faculty motivation and retention. Universities should establish salary structures that align with faculty expertise, workload, and market trends, ensuring fair compensation. Performance-based bonuses can serve as an additional motivator, rewarding faculty for excellence in teaching, research, and contributions to institutional growth. Research grants and funding opportunities should be readily available to support faculty engagement in scholarly work, fostering innovation and increasing the university's research output.

2. Career Growth & Professional Development. A clear and well-defined career trajectory is essential for faculty motivation. Universities should establish transparent promotion pathways that recognize academic excellence and leadership contributions. Professional development should be encouraged through training workshops, skill enhancement programs, and certifications, allowing faculty to continuously improve their teaching and research methodologies. International collaboration and faculty exchange programs can provide exposure to diverse academic practices, promoting cross-border research partnerships. Additionally, leadership and administrative training should be available for faculty members interested in assuming management roles, fostering a new generation of academic leaders who contribute to institutional excellence.

3. Non-Financial Recognition & Work Environment. Beyond financial rewards, non-monetary incentives play a significant role in fostering faculty satisfaction. Universities should implement public recognition programs, such as "Faculty of the Year" awards, certificates of excellence, and institutional honors to acknowledge outstanding contributions. Flexible work schedules can help faculty maintain a healthy work-life balance, allowing them to engage in both teaching and research without excessive administrative burdens. Providing access to academic databases, digital tools, and well-equipped research facilities enables faculty to work more effectively and advance their scholarly pursuits. Additionally, reducing bureaucratic constraints and streamlining administrative processes can significantly enhance faculty productivity, allowing them to focus more on their core academic responsibilities.

4. **Social Support & Institutional Engagement.** A supportive university environment fosters long-term faculty commitment. Institutions should offer wellness programs that prioritize faculty health, including mental health support, fitness programs, and stress management workshops. On-campus childcare services and family-friendly policies can significantly improve work-life balance, making academia more accessible for faculty with families. Additionally, faculty associations and mentorship programs can create a sense of community and professional solidarity. Organizing team-building activities, faculty retreats, and social gatherings helps strengthen collegial relationships, fostering a collaborative and inclusive academic culture. Universities should also promote work-life balance initiatives, such as reasonable teaching loads, paid leave policies, and faculty well-being programs, ensuring a sustainable and supportive work environment.

5. **Research & Innovation Incentives.** Encouraging research and academic innovation is vital for institutional success. Universities should establish internal grant programs to fund faculty-led research projects, allowing scholars to explore new academic frontiers. Interdisciplinary collaboration should be actively promoted, enabling faculty members from different fields to work together on innovative projects. Providing financial support for conference participation and academic publications ensures that faculty can disseminate their research globally, enhancing the university's academic reputation. Additionally, investment in digital learning technologies, research software, and modern laboratory facilities allows faculty to leverage cutting-edge tools in their teaching and scholarly work. By creating an environment that fosters research excellence, universities can position themselves as leading academic institutions on a national and global scale.

Therefore, a comprehensive support system and a well-structured faculty motivation strategy can significantly enhance the quality of teaching and research activities within the university.

DISCUSSION

Faculty motivation in higher education is a crucial factor in enhancing the effectiveness and quality of professional responsibilities. It is primarily driven by two key forms of motivation: extrinsic and intrinsic motivation, each playing a distinct role in academic engagement. Extrinsic motivation is influenced by external rewards such as career advancement opportunities, financial incentives, and institutional recognition, while intrinsic motivation stems from personal fulfillment, intellectual curiosity, and the passion for teaching and research.

Among the most significant motivating factors for university faculty are engagement in scientific research, professional status in society, intellectual work, pedagogical activities, and the flexibility of academic schedules. These factors collectively contribute to faculty satisfaction, long-term commitment, and overall productivity.

Achieving an optimal level of motivation requires a comprehensive and synergistic approach, combining multiple motivation strategies to maximize their collective impact. A well-structured motivation system not only enhances faculty performance and job satisfaction but also leads to higher-quality educational services, reducing faculty turnover and encouraging continuous professional development and creative engagement. Ultimately, an effectively motivated faculty contributes to the institution's academic reputation, research output, and long-term success.

CONCLUSIONS

An effective faculty motivation system in universities requires a comprehensive and multifaceted approach, integrating financial, non-financial, and social incentives. Achieving a high level of faculty engagement is possible through a combination of diverse motivation strategies, tailored to meet the individual needs of academic staff. Implementing the proposed measures will enhance university competitiveness, reduce faculty turnover, and create favorable conditions for the professional growth of academic and research staff.

Beyond financial and structural incentives, a long-term motivation strategy must consider not only economic and social factors but also psychological aspects that influence job satisfaction. Supporting scientific initiatives, developing internal and external recognition mechanisms for achievements in education and research, and strengthening mentorship programs play a crucial role in fostering faculty engagement and career development.

Furthermore, establishing a continuous feedback loop between faculty and university administration is essential for identifying challenges early and adjusting motivational policies accordingly. In the context of modern higher education, digital transformation and the expansion of distance learning models require universities to develop additional motivation strategies that support faculty in adapting to new teaching technologies and methodologies.

Ultimately, a holistic improvement of faculty motivation systems will not only contribute to individual professional growth but also strengthen universities' positions in the global education landscape. Investing in faculty motivation is an investment in the quality of education, institutional reputation, and long-term academic excellence.

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ARTÍCULO DE INVESTIGACIÓN

Emprendimiento digital: ¿qué hemos aprendido de 20 años de investigación?

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Resumen. En las últimas dos décadas, el Emprendimiento Digital (ED) ha surgido rápidamente como un área de estudio significativa, influenciada por los avances en tecnologías digitales e inteligencia artificial, junto con las transformaciones en las prácticas empresariales a nivel mundial. A medida que el campo continúa expandiéndose, el creciente volumen de investigaciones requiere una evaluación estructurada para sintetizar los desarrollos clave y las tendencias emergentes. Atendiendo a esta necesidad, este estudio realiza un análisis bibliométrico integral del campo, revisando 20 años de investigación (2006–2025) a través de datos extraídos de Scopus. Los resultados proporcionan un mapeo estructurado de las tendencias de investigación, ilustrando cómo los estudios sobre ED han evolucionado en diferentes países. Además, el estudio examina las publicaciones, autores y revistas más influyentes que han dado forma al discurso, arrojando luz sobre las contribuciones académicas que impulsan el campo. Asimismo, el análisis identifica seis clústeres emergentes de investigación que han ganado prominencia en los últimos años: Competencias digitales y comportamiento emprendedor, innovación tecnológica, ecosistemas emprendedores digitales, la influencia de la pandemia y el comercio electrónico, modelos de negocio en emprendimiento digital y el papel de las plataformas digitales y el emprendimiento femenino. Estos hallazgos destacan la naturaleza dinámica y en constante evolución de la investigación en ED, ofreciendo una comprensión más clara de su trayectoria académica y abriendo nuevas vías para futuras exploraciones.

Palabras clave: emprendimiento digital, Análisis bibliométrico, Comportamiento emprendedor, Revisión de la literatura.

Digital entrepreneurship: what do we learn from 20 years of research

Abstract. Over the last two decades, Digital Entrepreneurship (DE) has rapidly emerged as a significant area of study, shaped by advancements in digital technologies and artificial intelligence, alongside transformations in entrepreneurial practices globally. As the field continues to expand, the growing volume of research necessitates a structured evaluation to synthesize key developments and emerging trends. Addressing this need, this study conducts a comprehensive bibliometric analysis of the field, reviewing 20 years of research (2006–2025) through data extracted from Scopus. The findings provide a structured mapping of research trends, illustrating how DE studies have evolved across different countries. Additionally, the study examines the most influential publications, authors, and journals that have shaped the discourse, shedding light on the academic contributions that drive the field forward. Furthermore, the analysis identifies six emerging research clusters that have gained prominence in recent years: Digital competencies and entrepreneurial behavior, technological innovation, digital entrepreneurial ecosystems, the influence of the pandemic and e-commerce, business models in digital entrepreneurship, and the role of digital platforms & women entrepreneurship. These insights underscore the dynamic and evolving nature of DE research, offering a clearer understanding of its scholarly trajectory and opening new avenues for future exploration.

Keywords: digital entrepreneurship, Bibliometric analysis, Entrepreneurial behavior, Literature review.

INTRODUCTION

Technological advancements and the impact of pandemics have altered human behavior in many areas, from working and consuming to entrepreneurship. DE has become popular today by leveraging technology, differing from traditional entrepreneurship that requires physical presence and significant resources (Darmanto et al., 2023) digital knowledge, digital competence, and nascent digital entrepreneurs. The population comprises nascent digital entrepreneurs who previously participated in an entrepreneurial skills program in digital technology field to gain digital competence and received digital start-up funds in Central Java (2020). It is a crucial field of study, combining technology and entrepreneurial spirit to create new business models in the digital economy (Zhai et al., 2023).

Although DE has garnered research interest, there are still many questions about trends, influencing factors, and gaps that need deeper exploration. Bibliometric analysis helps aggregate research data, identify major trends, authors, journals, and influential countries, and explore the knowledge structure of the field (Lungu et al., 2024). While some reviews have been conducted, they may not fully update or exploit the rich potential of academic data. Hence, this study aims to provide a comprehensive and up-to-date view of DE. By bibliometrics analysis, this study reveals research trends on the topic from 2006 to early 2025, identify key themes, and clarify research gaps, thereby proposing future research directions to add value to the literature.

LITERATURE REVIEW

DE is a research field related to using digital technology to create and manage businesses (Keyhani et al., 2022) defines it as the process of establishing new businesses with innovative ideas in the digital economy, utilizing electronic platforms and data networks to provide products or services based on digital value (Paul et al., 2023) expand this definition, describing DE as a business development method through technological advancements, and it involves pursuing business opportunities based on communication technology and digital media. Nambisan (2017) emphasize the role of digital infrastructure and the digital business ecosystem in shaping entrepreneurial activities.

The combination of digitalization and entrepreneurship is not only involves digitizing traditional business activities but also creates entirely new business models, promoting innovation and expanding customer reach through digital technology (Zhai et al., 2023). With the development of the internet and artificial intelligence, big data analytics, and blockchain, DE offers significant opportunities in various fields, from e-commerce to financial services and online education (Sartika & Santosa, 2023).

Research on this topic has rapidly developed over the past two decades, especially after 2013. Initially, research focused on how businesses leverage digital technology to improve operational efficiency (Zhai et al., 2023). Later, studies expanded to aspects such as digital business models, DE processes, DE ecosystems, and the impact of digital technology on business innovation. The significant increase in the number of research studies in this field reflects the growing importance of DE in the global economy, particularly in the context of digital transformation and the rapid development of e-commerce. Research on this topic is rapidly evolving with thousands of articles published annually. However, there is fragmentation and a lack of coherence in research approaches (Paul et al., 2023). Bibliometrics helps systematize academic literature, identify research gaps, and propose new research directions, while also providing an overview of the field’s evolution over time.

TABLE 1. Previous studies using bibliometric methods on the same topic

Author(s)	Data	Findings of research clusters of DE	Publication Timeframe of Surveyed Works
Antara et al. (2024)	1690 papers from Web of Science	Five research clusters: digital economy, impact and social media, technology, performance, innovation, and digital technology.	2003-2023
Lungu et al. (2024)	3366 papers from Web of Science	Six research clusters: information technology, sharing economy, performance, digital entrepreneurship, digital instruments, and digital entrepreneurial ecosystem.	2000-2023
Zhai et al. (2023)	704 papers from Web of Science	Three research clusters: empowerment, evolution, and ecosystem.	1999-2021
Maulana et al. (2023)	1659 papers from Scopus	Five research clusters: literature, adoption, digital economy, student and outcome.	2012-2021
Scornavacca et al. (2022)	107 papers from Scopus and EBSCO	No research clusters, but presented the most co-occurrence keywords: startups, digital innovation, platforms, e-entrepreneurship and information technology.	2006-2020
Purnomo et al. (2020)	115 papers from Scopus	Seven research clusters: innovation, digitalization, entrepreneurship, business development, business model, e-commerce, and social media.	1993-2019

From the comparison table above, it can be seen that studies on DE using bibliometric methods have continuously increased in recent years. This indicates that this topic is rapidly developing and has many new aspects that need further research. Specifically, the number of scientific works on DE has increased significantly since 2010, especially after 2015, while most reviews on DE survey studies up to 2019-2023. The number of research works in 2024 has surged compared to previous years. Notably, while entrepreneurship is strongly impacted by the effects of pandemics, this impact has a lag, often appearing in the years 2022 to the present, thus requiring updates with the latest research data. Due to the rapid changes in the field, a bibliometric study after about 3-5 years can become outdated. For example, the study by Zhai et al. (2023) only considered data up to 2021, but Antara et al. (2024) updated data from the recent two years of 2022 and 2023, showing significant changes in research trends. Additionally, there is a lack of consistency in previous studies, with large discrepancies in research data sets, data sources, and keyword usage for collecting research works, leading to different analysis results. Therefore, Lungu et al. (2024) proposed expanding the analysis to multiple data sources for a more comprehensive view. These research gaps highlight the necessity and significance of this study.

RESEARCH METHODOLOGY

Bibliometric analysis is a popular method for synthesizing and evaluating research data to identify trends in the development of a scientific field (Donthu et al., 2021). To gain a comprehensive understanding of the evolution of research on DE, this study performs a bibliometric analysis based on the Scopus database, applying search strategies and scientific analysis methods to identify key research topics, collaborative networks, and the academic impact of research works.

Previous review studies have used datasets from Web of Science up to 2023 (Antara et al., 2024; Lungu et al., 2024), or from Scopus but only up to 2021 (Maulana et al., 2023; Scornavacca et al., 2022). However, these studies do not fully reflect the latest developments in DE. Therefore, this study expands the data scope to ensure more up-to-date and comprehensive coverage.

Data is collected from Scopus, one of the largest academic databases, containing peer-reviewed research documents across various scientific fields. To ensure the accuracy and scientific value of the data, only published articles, conference proceedings, and book chapters are included. Given that DE has only been systematically studied in the past 20 years, this study does not limit the publication year to ensure the inclusion of all relevant documents, including pioneering works that laid the foundation for the field. However, search results show the first work on this topic (according to the keyword “Digital Entrepreneur*”) was in 2006.

To optimize search results and ensure the collection of rich yet accurate data, the study uses the keyword “Digital Entrepreneur*,” where the asterisk (*) expands the search scope to include all variations such as Digital Entrepreneurial, Digital Entrepreneurship, Digital Entrepreneur... Through testing various keyword combinations, this approach proved to yield the richest and most accurate results. The selected works are within fields related to DE, including Business, Management, Finance, Psychology, and Social Science. Limiting to these fields helps focus on important aspects of DE, avoiding noise from unrelated works. The final dataset includes 935 papers which has been published since 2006 to early 2025.

After data collection, the study employs bibliometric analysis methods to evaluate the development of DE over time, including performance analysis, science mapping, and temporal analysis to explore changes in the topic through different development stages. Combining these methods helps the study provide not only an overview of DE but also identify key trends and research gaps to explore in the future.

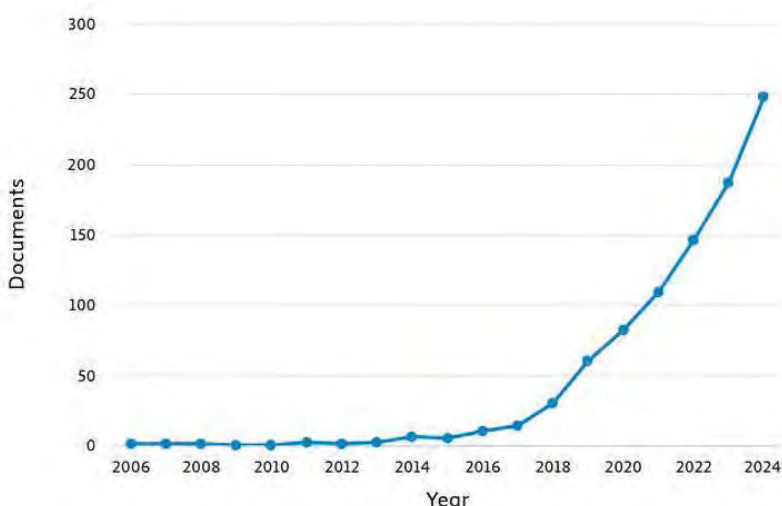
ANALYSIS RESULTS

Research trends over time

Over the past two decades, research on DE has experienced significant growth, particularly since 2019. As the below chart in Figure 1, there has been a notable increase in the number of published articles. Between 2006 and 2015, the annual publication rate did not exceed six articles. However, this trend began to shift in 2016, with the number of articles rising to ten, and by 2019, reaching sixty. The field has expanded even more rapidly from 2020 onwards, with 82 articles published in 2020, 109 in 2021, 146 in 2022, 187 in 2023, and an impressive 248 articles in early 2024.

This remarkable growth can be attributed to several factors, including technological advancements in artificial intelligence (AI) and big data, the acceleration of digital transformation due to the Covid-19 pandemic, and supportive policies for startups. This upward trend not only highlights the development of DE but also presents new research opportunities in areas such as digital business model innovation, the impact of technology, and financial strategies within digital enterprises.

Figure 1. Number of published papers by year



Research map by country

Research on DE has significant geographical distribution, with notable contributions from various countries globally. The United Kingdom leads with 111 research outputs, followed by the United States with 99, China with 86, Germany with 82, and Italy with 63. The United Kingdom and the United States are the most influential in DE research, likely

due to strong startup ecosystems and substantial investments in digital technology. China and Germany also contribute significantly, reflecting the growing importance of the topic in these economies. Countries in Asia, such as India, Indonesia, and Malaysia, have a notable presence, indicating the rising significance of DE in emerging economies. This trend is driven by rapid digital transformation and the development of digital business models. Other countries such as Canada (26 papers), Spain (25 papers), Portugal (24 papers), and Saudi Arabia (24 papers) also show considerable interest in this field. Vietnam ranks 18th with 18 research outputs, highlighting the country's growing focus on Digital Entrepreneurship.

National collaboration analysis has the same result as geographical, except China. The best collaborated country is the UK (112 papers, total link strength = 82) and the US (100 papers, total link strength = 87), with significant contributions from Germany, Italy, and France. Australia, Canada, and Spain also have extensive networks, especially with English-speaking countries. Asian countries like China, Malaysia, and Vietnam have notable participation but limited international collaboration, highlighting regional differences and potential for future expansion.

Figure 2. Research map by country

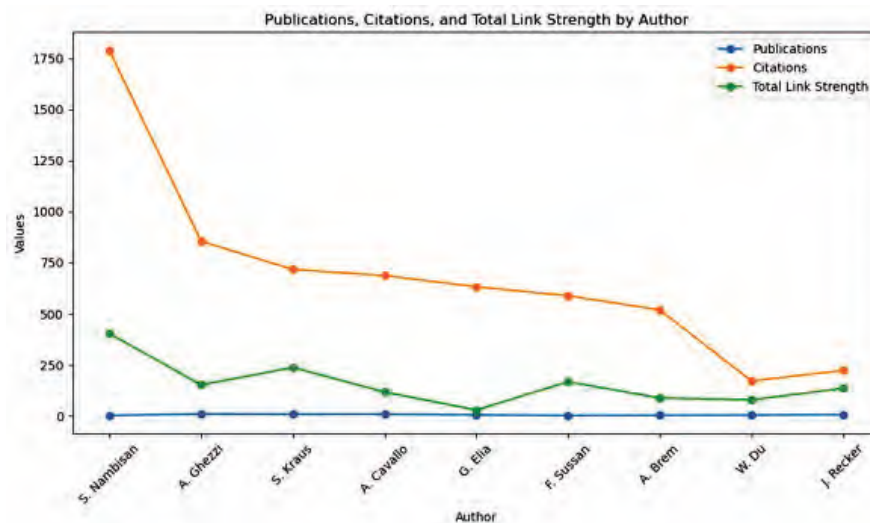


Most influential authors

The below figure highlights the varying influence of authors in DE research. Firstly, Nambisan exhibits the highest number of citations (1789) and total link strength (403), despite having only two publications (Nambisan, 2017; Nambisan & Baron, 2021). This indicates that Nambisan's work is highly influential and widely recognized within the academic community, suggesting a significant impact on the field. In contrast, A. Ghezzi, with the highest number of publications (10), has a relatively lower citation count (855) and total link strength (152) compared to Nambisan. This disparity suggests that while Ghezzi is prolific, the individual impact of each publication may be less pronounced than that of Nambisan.

In addition, S. Kraus and A. Cavallo, both with nine publications, show differing influence levels, with Kraus being more interconnected. G. Elia, with five publications, has high citations (632) but low link strength (29), indicating frequent citations but less central influence. F. Sus-san, with two publications, also shows notable impact. A. Brem, W. Du, and J. Recker contribute variably, highlighting the importance of both publication quantity and quality in DE research. By author collaboration analysis, the data shows that there is a vast research network in Digital Entrepreneurship. Key contributors like Antonio Ghezzi, Tobias Kollmann, Sascha Kraus, and Jan Recker have high publication counts and significant citations.

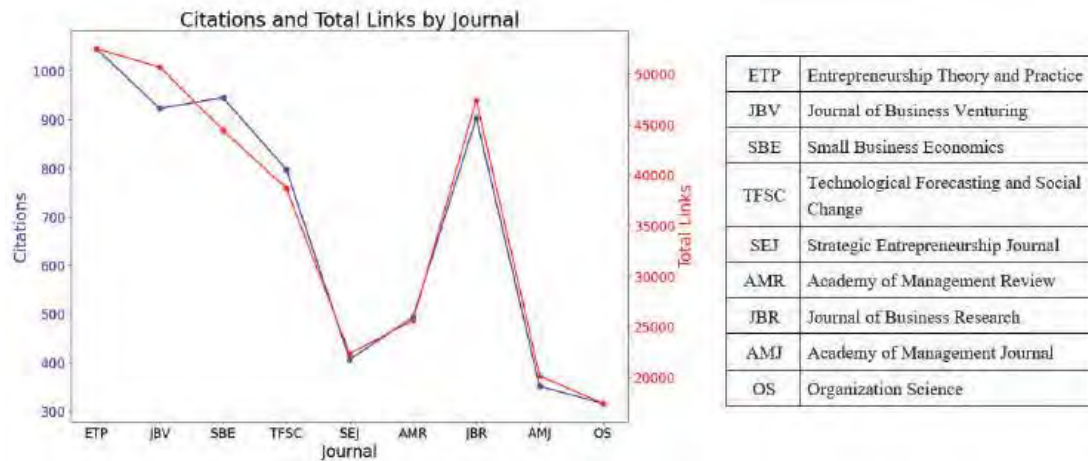
Figure 3. Most influential authors



Influential journals

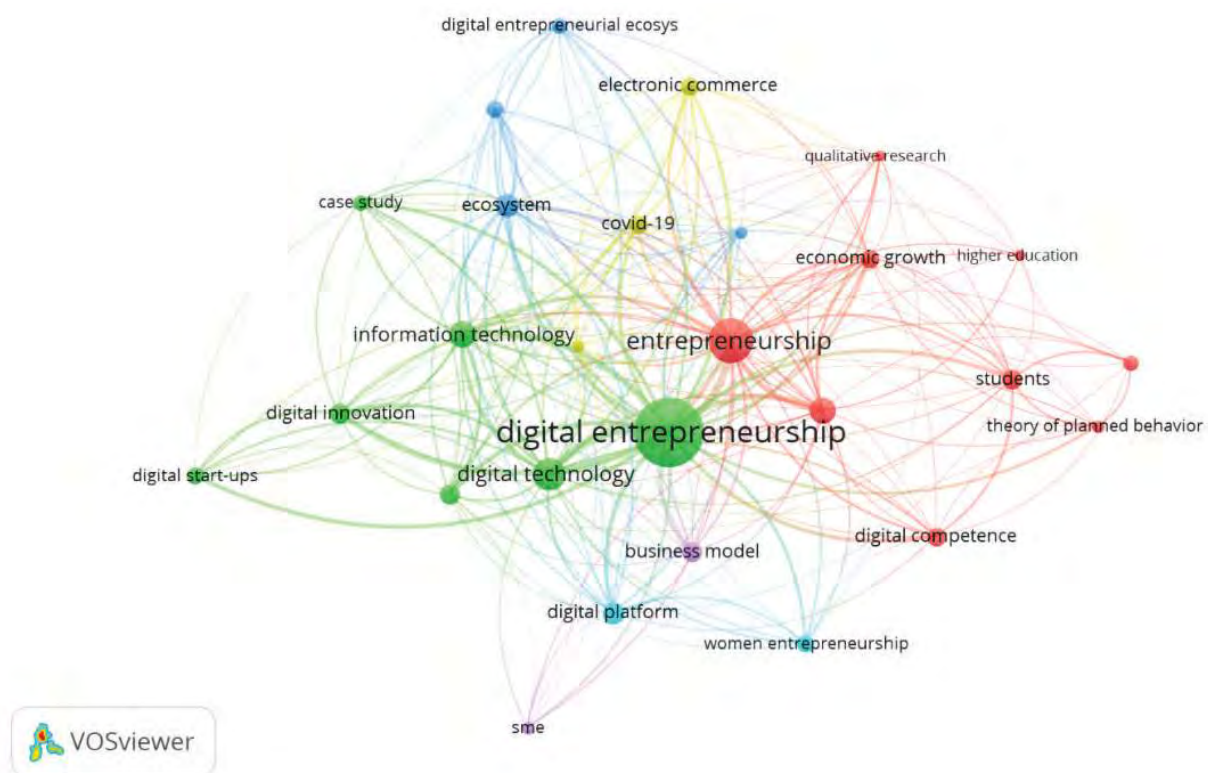
Identifying influential journals in DE helps evaluate the academic environment where significant research is published. This section analyzes the relationship between citations and total links for various business and management journals. The ten most influential journals in the field of digital entrepreneurship research are all leading publications in management and business. This indicates that the research topic is recognized by top editors and reviewers at the most prestigious journals worldwide.

First, Entrepreneurship Theory and Practice leads with the highest total links (52,522) and significant citations (1,046), indicating its strong influence and connectivity. Journal of Business Venturing and Small Business Economics also show high impact with substantial total links and citations. Following these two journals are four leading journal in business and management field. Technological Forecasting and Social Change, Strategic Entrepreneurship Journal, Academy of Management Review, and Journal of Business Research demonstrate varying degrees of influence, with notable total links and citations reflecting their importance in their respective fields. In the contrary, Academy of Management Journal and Organization Science still show significant total links, highlighting their roles in advancing management and organizational studies, while having fewer citations. Overall, journals with higher total links and citations are more influential and central to academic discourse in business and management.

Figure 4. Most influential journals.

Main research clusters

The bibliometric analysis of research clusters in digital entrepreneurship reveals six distinct clusters, each highlighting different aspects of the field, as showed in the Figure 5 below. With a threshold of a minimum of five occurrences per keyword, 27 out of 3,419 keywords meet this criterion.

Figure 5. DE research clusters

Cluster 1 is about Human factors and entrepreneurial behavior. In this cluster, key concepts are digital competence (32 occurrences, 53 links), digital entrepreneurial intention (22 occurrences, 20 links), economic growth (31 occurrences, 76 links), and higher education (13 occurrences, 14 links). The research emphasizes the importance of digital skills, the intentions behind digital entrepreneurship, the role of higher education, and the broader economic impacts on entrepreneurial behavior.

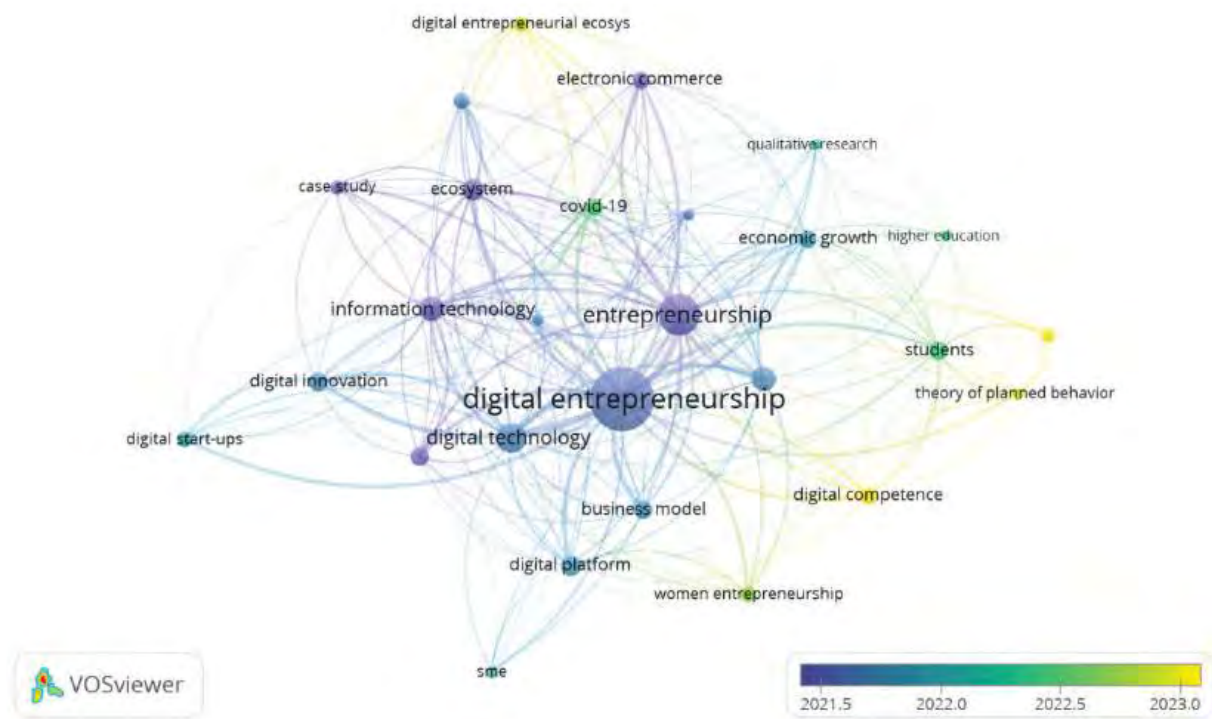
Similarly, cluster 2 is about technology and innovation which employed by human beings. This includes topics like digital technology (98 occurrences, 220 links), digital innovation (41 occurrences, 95 links), information technology (66 occurrences, 161 links), and start-ups (39 occurrences, 80 links). This cluster investigates how digital technologies facilitate entrepreneurship, the critical role of innovation within digital business environments, and the technological trends that shape entrepreneurial models.

In the other hand, cluster 3 and 4 are about entrepreneurial environment. Cluster 3 - Digital entrepreneurial ecosystem - includes themes such as digital entrepreneurial ecosystem (22 occurrences, 41 links), ecosystem (49 occurrences, 121 links), and entrepreneurial ecosystem (26 occurrences, 57 links). And cluster 4 - Impact of the Pandemic and e-commerce - addresses the significant effects of the pandemic on digital entrepreneurship and the expansion of e-commerce. In this cluster, key topics include Covid-19 (31 occurrences, 60 links) and electronic commerce (31 occurrences, 69 links).

Another DE research direction is business models and small enterprises which is mentioned in cluster 5. Important keywords in this cluster are business model (37 occurrences, 68 links) and SME (17 occurrences, 23 links). And the last cluster included digital platform (42 occurrences, 80 links) and women entrepreneurship (27 occurrences, 39 links). This cluster underscores the significance of digital platforms in empowering women and promoting gender equality in the entrepreneurial landscape.

In general, the bibliometric analysis identifies key research areas and trends in digital entrepreneurship, providing valuable insights into the factors driving the field's development. Each cluster highlights different dimensions of digital entrepreneurship, from human factors and technological innovation to the impact of the pandemic and the role of digital platforms in supporting diverse entrepreneurial activities.

Moreover, as illustrated in Figure 6 below, research topics have shown a tendency to evolve over time. Prior to 2020, studies predominantly focused on digital entrepreneurial ecosystems, technology and innovation, and digital business models. However, during the period from 2020 to 2022, the advent of the COVID-19 pandemic spurred research into e-commerce, changes in digital business behavior, and crisis adaptation strategies. Most recently, from 2022 to the present, research trends have shifted towards topics such as digital competence of entrepreneurs, women's entrepreneurship in the digital economy, and the role of digital platforms in business development.

Figure 6. DE research clusters by year

CONCLUSION

Based on the comprehensive analysis of 20 years of research on DE, this study provides valuable insights into the evolution and current state of the field. The findings highlight six core research clusters: digital competencies and entrepreneurial behavior, technological innovation, digital entrepreneurial ecosystems, the influence of the pandemic and e-commerce, business models in digital entrepreneurship, and the role of digital platforms and women entrepreneurship. These clusters not only reflect the diverse aspects of DE but also underscore the dynamic nature of the field, driven by technological advancements and global events such as the Covid-19 pandemic.

The dataset of this research is collected from Scopus, covering publications from 2006 to 2025, ensures a comprehensive and up-to-date perspective on DE. This approach contrasts with previous bibliometric studies, which often had narrower scopes and outdated data. By identifying emerging research themes and trends, this study contributes to a deeper understanding of DE and provides a foundation for future research.

In conclusion, the study emphasizes the importance of continuous monitoring and updating of research data to capture the evolving trends in DE. The identified research clusters offer a roadmap for scholars and practitioners to explore new opportunities and address existing gaps in the literature. As DE continues to grow and transform, ongoing research will be crucial in understanding its impact on the global economy and guiding the development of innovative digital business models.

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ARTÍCULO DE INVESTIGACIÓN

Fundamentos metodológicos para la evaluación de la transformación del ecosistema de la esfera social de Ucrania a partir de la arquitectura de la recuperación global

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Resumen. El artículo examina la arquitectura del ecosistema del sector social en Ucrania con énfasis en las transformaciones glocales en el contexto de la recuperación posterior al conflicto. Está dedicado a los problemas más importantes para comprender la adaptabilidad de un sistema social, la transformación digital y la sostenibilidad institucional en condiciones de guerra. La metodología utiliza el innovador Índice Compuesto de Transformación Glocal (CIGT), que combina dimensiones estructurales, funcionales y adaptativas del análisis de los ecosistemas sociales. Se utilizó un enfoque mixto, combinando métodos de investigación cuantitativos y cualitativos en todas las regiones de Ucrania. Los resultados muestran diferencias regionales significativas en la adaptación institucional y la transformación social. Las regiones occidentales

demostraron la mayor plasticidad institucional y cohesión social, lo que se explica por el menor impacto directo de los conflictos militares y una infraestructura de sociedad civil desarrollada. La transformación digital ha puesto de manifiesto limitaciones sistémicas caracterizadas por un acceso desigual a los servicios digitales, bajos niveles de alfabetización digital y barreras institucionales para su implementación. Se identificó la transformación digital y los aspectos sociales como factores clave en la sostenibilidad del sistema. Un aspecto único es el fenómeno de la cohesión social como el parámetro más estable de transformación, que es especialmente evidente durante los períodos de conflicto militar, cuando la sociedad ucraniana demuestra un alto potencial de adaptación y capacidad de autoorganización. Se proporciona un marco integral para comprender los conceptos arquitectónicos del ecosistema social, ofreciendo recomendaciones prácticas para la gobernanza social y estrategias de transformación sistemática en situaciones de posconflicto.

Palabras clave: ecosistema social, transformación digital, resiliencia institucional, transformaciones glocles, recuperación posconflicto, cohesión social.

Methodological foundations for assessing the transformation of the ecosystem of the social sphere of Ukraine on the basis of architectonics of global recovery

Abstract. The article examines the architecture of the social sector ecosystem in Ukraine, with emphasis on glocal transformations in the context of post-conflict recovery. It is dedicated to the most important issues for understanding the adaptability of a social system, digital transformation, and institutional sustainability under conditions of war. The methodology employs the innovative Composite Index of Glocal Transformation (CIGT), which combines structural, functional, and adaptive dimensions in the analysis of social ecosystems. A mixed-method approach was used, combining quantitative and qualitative research methods across all regions of Ukraine. The results show significant regional differences in institutional adaptation and social transformation. The western regions demonstrated the highest institutional plasticity and social cohesion, which is explained by the lower direct impact of military conflicts and a well-developed civil society infrastructure. Digital transformation has revealed systemic limitations characterized by unequal access to digital services, low levels of digital literacy, and institutional barriers to implementation. Digital transformation and social aspects were identified as key factors in the sustainability of the system. A unique aspect is the phenomenon of social cohesion as the most stable parameter of transformation, which is especially evident during periods of military conflict, when Ukrainian society demonstrates a high potential for adaptation and self-organization. The study provides a comprehensive framework for understanding the architectural concepts of the social ecosystem, offering practical recommendations for social governance and systematic transformation strategies in post-conflict situations.

Keywords: social ecosystem, digital transformation, institutional resilience, glocal transformations, post-conflict recovery, social cohesion.

INTRODUCTION

The social sphere ecosystem constitutes a complex, multifaceted system that plays a pivotal role in ensuring societal well-being and fostering sustainable development (Kolot et al., 2020; Kolot & Herasymenko, 2022; Martínez Montenegro & Calderón Astete, 2024). In the context of Ukraine, this system confronts unprecedented challenges precipitated by Russian military aggression, necessitating both immediate recovery efforts and long-term transformational changes (Larina et al., 2024; Zavorodnii et al., 2024). The concept of social sphere architectonics has emerged as a theoretical framework for elucidating these intricate transformational processes.

Recent scholarly endeavors have emphasized the significance of an ecosystem approach to analyzing social transformations. The current trends in the development of the social sphere in the context of digital transformation are explored in the work of Allam et al. (2022). The researchers analyze the impact of virtual technologies on urban development and the formation of new forms of social interaction.

An important area of research is the role of educational institutions in the development of the social sphere, as revealed in the work of Klofsten et al. (2019). The authors substantiate the importance of entrepreneurial universities as drivers of economic growth and social change.

However, a notable lacuna persists in understanding how these theoretical frameworks can be operationalized for practical assessment and management of social sphere transformations, particularly in post-conflict contexts.

Zenkienė et al. (2024) analyze architectonics as a basis for understanding the innovative development of socio-economic systems and their adaptation to global challenges. As noted by Kolot & Herasymenko, 2022; Martínez Montenegro & Calderón Astete, 2024, the architectonics of the social sphere ecosystem is a complex structural organization of interconnected elements, relations, and processes that shape the functioning of key institutional domains of society. Novakovska et al. (2025) emphasize that architectonics includes the basic provisions and specification of methods, tools and levers of system development.

The extant literature predominantly focuses on discrete aspects of social sphere development. While some researchers examine institutional transformations (Vasilyeva et al., 2024; Zerkina et al., 2022) or digital adaptation (Shirish et al., 2025; Pylypenko et al., 2022), few studies offer integrated approaches to assessing the overall architectonics of social ecosystems. This fragmentation in research approaches limits our understanding of the complex interplay between different components of the social sphere and their collective response to global challenges.

Research Gap: Despite burgeoning scholarly attention to social sphere development, there is a conspicuous absence of comprehensive methodological frameworks that would: (1) integrate structural, functional, and adaptive dimensions of social ecosystem analysis; (2) provide quantitative tools for assessing transformation processes; and (3) account for the specific challenges of post-conflict recovery.

Research Questions: This study addresses the following research questions:

- 1) How can the architectonics of the social sphere ecosystem be conceptualized and evaluated in the context of global transformations?

- 2) What are the key determinants influencing the development of the social sphere ecosystem in post-conflict conditions?
- 3) How can the effectiveness of social sphere transformation be measured and evaluated?

Objective: The purpose of this study is to develop and validate an integrated approach to assessing the architectonics of the social sphere ecosystem, with a particular focus on post-war recovery contexts. This includes developing a composite index of glocal transformation and identifying key developmental determinants.

Scientific Novelty: The study introduces several innovative elements: (1) a comprehensive framework for analyzing social sphere architectonics; (2) a novel composite index for assessing glocal transformations; and (3) an integrated approach to evaluating ecosystem development determinants. The findings of this study contribute to both theoretical understanding of social sphere development and practical tools for managing transformation processes in post-conflict settings.

The rest of this paper is structured as follows: Section 2 presents a comprehensive literature review examining theoretical approaches to social sphere architectonics and ecosystem development. Section 3 delineates the research methodology, detailing the development and structure of the Composite Index of Glocal Transformation (CIGT) and the mathematical model for ecosystem analysis. Section 4 presents the analytical results, focusing on the assessment of social sphere ecosystem architectonics, implementation of the CIGT methodology, analysis of key development determinants, and examination of transformation patterns and practices. Section 5 discusses the implications of our findings for both theory and practice, offering specific recommendations for policy makers and stakeholders. Finally, Section 6 concludes by summarizing key findings, acknowledging methodological limitations, and suggesting directions for future research.

LITERATURE REVIEW

The scholarly discourse on social sphere architectonics and ecosystem development has evolved significantly in recent years, particularly in response to global challenges and post-conflict recovery needs. This review synthesizes the extant literature into several key theoretical streams.

Ecosystem approach to social sphere

The ecosystem perspective on social sphere development has garnered considerable attention in recent research. Kolot & Herasymenko (2022) conceptualize the social sphere as a complex adaptive system, emphasizing its capacity for self-organization and transformation. This foundational understanding is further developed by Pope & Lim (2020), who examine the dynamic interactions between different ecosystem components and their collective response to external challenges. Mihr (2021) extends this framework by introducing the concept of institutional resilience within social ecosystems, which is particularly relevant for post-conflict societies. This research highlights how social systems adapt and maintain functionality while undergoing significant transformations.

Glocalization and social transformations

The dialectic between global and local processes in social sphere development has emerged as a critical area of study. Silva et al. (2024) identify key characteristics of glocal processes, including the integration of global standards with local practices, the formation of hybrid institutional structures,

and the evolution of social regulation mechanisms. Suntsova (2024) further elaborate on this theme by examining how local social systems respond to global challenges while maintaining their distinctive characteristics. Their research particularly focuses on adaptation mechanisms in social service delivery, cultural integration processes, and innovation in social governance.

Architectonics and structural organization

The structural aspects of social sphere organization have received significant scholarly attention. Institutional architecture, as one of the fundamental categories, is undergoing significant changes in the context of digital transformation. Shirish et al. (2025) note that digitalization creates new opportunities for the development of social institutions and the formation of innovative models of interaction. LopezDeAsiain et al. (2024) extend this understanding by considering architectonics as a method of building complex socio- economic systems that determines their internal organization and management mechanisms.

The stakeholder dimension of the social ecosystem architecture is becoming of particular importance. According to the research of Bravaglieri et al. (2025), its analysis should include the identification and characterization of key stakeholder groups, analysis of their interests and needs, assessment of the impact on the formation and development of social architectonics, as well as the study of mechanisms of interaction between different groups of stakeholders (Dmytrenko et al. 2021).

Digital transformation and social innovation

Recent literature increasingly focuses on the role of digital technologies in reshaping social sphere architectonics. Ng et al. (2024) emphasize that the emergence of new digital platforms and communication technologies has created new forms of social organization and interaction that require a rethinking of traditional social architectural frameworks. At the same time, Kosheleva et al. (2024) emphasize the importance of forming more resilient and adaptive social structures that are consistent with the principles of sustainable development. Holubchak et al. (2020) explore the architectural and urban planning aspects of the formation of innovation hubs in the context of creative urban regeneration, emphasizing that such spaces provide unique opportunities to accelerate the generation and diffusion of innovations.

Mahbub (2021) focuses on the role of blockchain technologies in ensuring the security of IoT infrastructure in the social sphere, proposing to consider architectonics as a way to build a decentralized, reliable and secure environment for the development of social ecosystems in the context of digitalization.

Shirish et al. (2025) examine how digitalization creates new opportunities for social service delivery innovation, community engagement enhancement, and administrative efficiency improvement.

Resilience and post-conflict recovery

A growing body of literature addresses the specific challenges of social sphere development in post-conflict contexts. Bar-ner & Marom (2024), Robazza et al. (2024) analyze how local social systems adapt to post-conflict challenges through participatory practices development, innovative governance models, and community cohesion strengthening.

Assessment and measurement frameworks

The literature reveals various approaches to measuring social sphere transformation. Howard et al. (2024) demonstrate the complex interconnections between socio-economic factors and system development, while Martínez et al. (2023) propose frameworks for assessing system resilience.

Research gaps

Despite the rich theoretical foundation, several gaps in the literature remain:

- 1) Limited integration of different theoretical approaches.
- 2) Lack of comprehensive assessment methodologies.
- 3) Insufficient attention to post-conflict transformation specifics.
- 4) Need for more empirical validation of theoretical frameworks.

This review demonstrates the need for an integrated approach that would combine various theoretical perspectives while addressing the practical challenges of social sphere transformation in post-conflict contexts. Bridging these research gaps requires the development of a comprehensive analytical framework that integrates structural, functional, and adaptive dimensions of social ecosystems, provides quantitative assessment tools, and accounts for the specificities of post-conflict recovery. The following sections of this paper aim to address these challenges by proposing an integrated approach to assessing the architectonics of the social sphere ecosystem in the context of glocal transformations.

Hypothesis of the study:

In the context of glocal transformations and post-conflict recovery, Ukraine's social ecosystem is a complex adaptive network capable of self-organization and evolution through the dynamic interaction of institutional, technological, and social components, in this respect:

1. The integral sustainability of the social ecosystem depends on:
 - The level of institutional adaptability.
 - The potential of digital transformation.
 - The degree of social cohesion.
 - Efficiency of intercomponent interactions.
2. There regional differences in the architectonics of the social sphere:
 - The differential impact of the military conflict.
 - Variability of civil society infrastructure.
 - Uneven social and economic development of the territories.
3. A comprehensive assessment of social transformation can be carried out through the development of a Consolidated Index of Glocal Transformation, which combines structural, functional and adaptive dimensions of the social ecosystem. Additional research assumptions:
 - Digital transformation is a catalyst for institutional change.
 - Social cohesion is a key mechanism for adaptation in the face of hybrid challenges.

METHODS

The methodological framework used in this study combines numerous analytical approaches to assessing the architectonics of the social sector ecosystem and global transformations in Ukraine. The comprehensive methodology includes the following components: development of an integral index, ecosystem analysis, data collection, and statistical analysis. Table 1 provides a systematic overview of the methodological framework with a detailed description of the elements, indicators, and analytical approaches of each component.

TABLE 1. Overview of the methodological framework

Component	Elements	Indicators/Methods	Formula/Approach
1. CIGT development	Social and institutional resilience (SIR)	– New institutional forms (n_1) – Transformation efficiency (n_2) – Institutional adaptability (n_3) – Inter-sectoral interaction (n_4) – Social dialog (n_5) – Connection network (n_6)	$CIGT = 0.25 \times SIR + 0.20 \times SDT$
	Social digital transformation (SDT)	– Digitalization of services (d_1) – Quality of infrastructure (d_2) – Availability of services (d_3) – Digital interaction (d_4) – Platform efficiency (d_5) – Digital switching (d_6)	$X_{norm} = (X - X_{min}) / (X_{max} - X_{min})$
2. Ecosystem analysis	System components	– Digital transformation (D) – Environmental factors (E) – Social aspects (S) – Institutional architecture (I) – Regional development (R)	$A = f(D, E, S, I, R)$
3. Data collection	Primary data	– A survey by the Razumkov Center: – Sampling: 2016 respondents – Coverage: 25 regions – Accuracy: $\pm 2,3\%$	Face-to-face interviews; Stratified multistage sampling
	Secondary data	– Decentralization portal – Regional development agencies – Social statistics	Analysis of documents; Statistical collection
	Expert Evaluation	– Interviews with service providers – Focus groups of community leaders – Case studies transformations	Qualitative analysis
4. Statistical analysis	Network analysis	– Shannon diversity index (H') – Freeman's centralization index (C) – Network density	$H' = -\sum(p_i \times \ln p_i)$ $C = \sum(c_{max} - c_i) / [(n-1)(n-2)]$
	Correlation analysis	– Pearson's coefficients – Significance testing – Factor analysis	$p < 0.05$; Calculation of r-values

Note: the methodological framework integrates quantitative and qualitative approaches to provide a comprehensive assessment of the architectonics of the social sphere ecosystem in wartime.

Table 1 illustrates the comprehensive methodological approach used in this study.

The Composite Index of Glocal Transformation (CIGT) is an innovative tool for a comprehensive assessment of social transformation processes in the context of glocalization and post-conflict recovery. The CIGT combines two key components: social and institutional resilience (SIR) and social digital transformation (SDT).

The social and institutional resilience (SIR) component includes six indicators:

- New institutional arrangements (n_1): assesses the emergence and development of innovative institutional arrangements adapted to the context of post-conflict recovery.
- Transformation effectiveness (n_2): measures the effectiveness of institutional transformations in terms of achieving social development goals. (Lopushniak et al., 2024)
- Institutional adaptability (n_3): assesses the ability of institutions to adapt to changing conditions and challenges.
- Inter-sectoral cooperation (n_4): analyzes the effectiveness of cooperation between different sectors (public, private, civil society) in the transformation process.
- Social Dialogue (n_5): assesses the level of involvement and participation of stakeholders in decision-making processes.
- Network connectivity (n_6): measures the degree of integration and interconnection between different components of the social ecosystem.

The social digital transformation (SDT) component includes six indicators:

- Digitalization of services (d_1): assesses the level of implementation of digital technologies in the provision of social services.
- Infrastructure quality (d_2): measures the availability and reliability of digital infrastructure.
- Accessibility of services (d_3): analyzes the level of access to digital social services.
- Digital engagement (d_4): assesses the effectiveness of digital platforms for communication and interaction between service providers and users.
- The effectiveness of the platforms (d_5): measures the effectiveness of digital platforms in delivering services and achieving social outcomes.
- Digital inclusion (d_6): estimates the level of digital literacy and engagement of different population groups.

A weighted sum of component values with the following weighting factors is used to calculate the CIGT:

$$\text{CIGT} = 0.25 \times \text{SIR} + 0.20 \times \text{SDT} \quad [1]$$

The weighting factors were determined on the basis of expert opinions and theoretical justification of the relative importance of each component for the overall transformation processes.

To ensure comparability and aggregation of indicators, the data is normalized using a formula:

$$X_{\text{norm}} = (X - X_{\text{min}}) / (X_{\text{max}} - X_{\text{min}}) \quad [2]$$

where X is the initial value of the indicator, X_{min} and X_{max} are the minimum and maximum values of the indicator in the data set.

The proposed CIGT methodology allows for a comprehensive quantitative assessment of social sector transformation processes at different levels (national, regional, local) and in different dimensions (institutional and digital). The index can be used for comparative analysis, progress monitoring, and identification of priority areas for intervention.

The CIGT is based on an interdisciplinary approach that combines theoretical frameworks from the fields of social policy, regional development, digital transformation, and post-conflict recovery. Index methodology was validated through consultations with experts and testing on empirical data.

The research methodology involves the application of an ecosystem approach for a comprehensive analysis of transformation processes in the social sphere. Ecosystem analysis is based on the understanding of the social sphere as a complex adaptive system consisting of interconnected components and characterized by dynamic interactions and feedbacks.

The study identifies five key components of the social sector ecosystem:

- Digital transformation (D): covers the processes of implementing digital technologies, digital infrastructure development, and social services digitalization.
- Ecological factors (E): include the impact of the environment, natural resources and ecological sustainability on social sphere functioning.
- Social aspects (S): reflect the social structure, human capital, social cohesion, and social relations within the ecosystem.
- Institutional architecture (I): covers formal and informal institutes, organizational structures, governance mechanisms, and regulatory frameworks that determine the functioning of the social sphere.
- Regional development (R): takes into account territorial features, development imbalances, decentralization processes and local initiatives within the ecosystem.

A mathematical model is used to conceptualize the interactions between ecosystem components:

$$A = f(D, E, S, I, R) \quad [3]$$

where A is the state of the social sphere ecosystem, f is a function that reflects the interactions between components, D, E, S, I, R are the relevant components of the ecosystem.

Ecosystem analysis involves the study of the structural characteristics of the ecosystem (network density, diversity of actors, centralization), functional relationships between components (flows of resources, information, influences), and adaptive properties of the system (resilience, adaptability, self-organization).

A combination of quantitative and qualitative methods is used to operationalize ecosystem analysis. Quantitative analysis includes the calculation of structural indicators (e.g., Shannon's diversity index, Freeman's centralization index), correlation analysis to identify relationships between components, and the construction of network models to visualize the structure of the ecosystem (Freeman, 1979; Burt, 1992).

Qualitative analysis involves in-depth interviews with key stakeholders (representatives of government agencies, service providers, community leaders), focus groups, and case studies of successful transformation practices to identify functional relationships, adaptive mechanisms, and drivers of change in the ecosystem.

The results of the ecosystem analysis provide a holistic understanding of the architecture of the social sector ecosystem, identify the key determinants of its development, assess its adaptive capabilities, and develop recommendations for optimizing the system's functioning in the face of transformational challenges.

The proposed methodology of ecosystem analysis expands traditional approaches to the study of the social sphere, focusing on complex interactions between heterogeneous components and adaptive properties of the system. The application of the ecosystem perspective allows to take into account the complexity and dynamism of social transformations, as well as to develop more effective and adaptive strategies for the development of the social sphere in the context of uncertainty and post-conflict recovery.

The data collection methodology combines three different approaches: primary data collection through a survey by the Razumkov Center (Razumkov Center, 2024, October 15) (n=2016), secondary analysis of data from official sources, and expert opinions using qualitative research methods. Such a triangulation ensures full coverage of the phenomena under study.

RESULTS OF THE STUDY

The application of the proposed methodological framework allowed to comprehensively assess the architectonics of the social sphere ecosystem and the impact of global transformations. The results are presented in four key areas: evaluation of the ecosystem architectonics, implementation of the CIGT methodology, analysis of the determinants of development, and research of transformation models.

Evaluation of the architectonics of the social sphere ecosystem

Evaluation of the architectonics of the social sector ecosystem in Ukraine required a comprehensive approach that combines structural analysis, assessment of functional relationships, and measurement of the system's adaptive properties.

The study, which covered 25 regions of Ukraine, revealed significant regional differences in the ability to adapt to the challenges caused by military aggression, demonstrating uneven social and economic development and varying degrees of the impact of war on regional social systems.

This study was based on materials published on the Decentralization portal (<https://decentralization.ua/>). This resource provided important information on the current state and dynamics of decentralization processes in Ukraine, as well as on various aspects of regional development in the context of war. In particular, news, analytical materials and reports on the activities of territorial communities, regional development agencies and the implementation of social programs at the local level were analyzed (MCTDU, 2024). The use of this source provided up-to-date and relevant information on the state of the social sphere in different regions of Ukraine, which significantly enriched the empirical basis of the study.

Based on the data of the Razumkov Center's sociological survey (n=2016, September 2024), institutional reports of the Decentralization portal, and statistics from Regional Development Agencies, we analyzed several dimensions of the social sector ecosystem. Table 2 presents key indicators for four main dimensions: network density, institutional diversity, centralization, and public trust.

TABLE 2. Key indicators for assessing the social sector ecosystem

Size	Metrics	Value	Statistical significance
Network density	Average institutional density	2.15 per 1000 population	SD= 0.68
	Correlation of sustainability	r= 0.62	p< 0.01
	Regional variation	1,47-2,83	-
Institutional diversity	The average value of the Shannon index (H')	1.82	SD= 0.31
	Urban regions	2,3-2,5	-
	Rural regions	1,2-1,5	-
	Conflict zones	0,8-1,0	-
Centralization	The average value of the Freeman index	0,43	SD= 0.12
	Regions of high centralization	0,65-0,70	-
	Regions of low centralization	0,25-0,35	-
Public trust	The Armed Forces of Ukraine	91,5%	±2,3%
	Civil society organizations	59,0%	±2,3%
	Local government	47,4%	±2,3%

Network density indicators demonstrate significant regional heterogeneity in institutional development. The average institutional density of 2.15 organizations per 1000 population (SD=0.68) indicates moderate development of social infrastructure with significant regional variations (1.47-2.83). The strong positive correlation between network density and system resilience (r=0.62, p<0.01) confirms the theoretical framework proposed by Martínez Montenegro, I. & Calderón Astete (2024) on the impact of the institutional network on system adaptability.

Institutional diversity, measured by the Shannon index (H'), revealed clear patterns across settlement types. Urban areas showed greater diversity (H'=2.3-2.5), reflecting more complex institutional structures, while conflict-affected areas showed less diversity (H'=0.8- 1.0), consistent with previous post-conflict studies (Mihir, 2021). The observed regional variations in institutional diversity are significantly correlated with indicators of socioeconomic development (r=0.58, p<0.01).

The results of the Freeman Centralization Index (mean=0.43, SD=0.12) indicate moderate levels of centralization of governance with marked regional differences. Higher centralization in conflict zones (0.65-0.70) indicates adaptation to security challenges, while regions with a developed civil society show lower centralization (0.25-0.35), demonstrating more distributed governance structures.

The analysis showed that the key factors that determine the sustainability of the social ecosystem of regions are: the institutional capacity of local governments, the availability and effectiveness of structural units in communities, the level of cooperation with regional development agencies (RDAs), the ability to attract international assistance, human resource development, adaptation to security challenges, and the development of entrepreneurship as a basis for economic sustainability.

An important aspect of the development of the social sector in the context of decentralization was the transfer of powers to provide social services to the level of territorial communities in accordance with the Law of Ukraine “On Social Services” of January 1, 2020 (VRU, 2019). This requires communities to establish appropriate structural units and provide basic social services in accordance with the standards of the Ministry of Social Policy. However, the study revealed that not all communities have sufficient resources and workforce capacity to effectively perform these functions, which poses risks to the stability of the social ecosystem in certain regions.

Regions with more developed institutional capacity and effective mechanisms for cross-sectoral cooperation demonstrate a better ability to adapt to crisis conditions. For example, the western regions of Ukraine have a higher resilience of the social ecosystem, which is partly explained by the less direct impact of the hostilities and a more developed civil society infrastructure.

The role of RDAs in supporting the development of the social sector is becoming increasingly important. For example, the RDA of Sumy Oblast successfully implements projects with the support of international organizations and conducts training to increase community capacity (Decentralization Portal, 2024, November 19). Such initiatives contribute to strengthening the resilience of the social ecosystem at the regional level.

In the context of regional development, special attention is paid to border areas that face specific security and economic challenges. Implementation of projects to restore infrastructure, support businesses, and meet the basic needs of the population in the border area is becoming a priority to preserve the integrity of the country's social ecosystem.

The study also revealed significant regional differences in the density of the institutional network. For example, the western regions of Ukraine have a higher resilience of the social ecosystem, which may be due to less direct impact of the hostilities and a more developed civil society infrastructure. In contrast, border regions, such as Sumy Oblast, face additional challenges, but are actively working to develop social infrastructure with the support of regional development agencies.

The analysis also took into account the impact of the war on the social sphere, in particular, the need to adapt social services to the needs of internally displaced persons and veterans. For example, the creation of humanitarian hubs in some communities demonstrates the ability of the social ecosystem to adapt to new challenges. Regions with higher densities have demonstrated a higher level of adaptability and resilience to external challenges, which is consistent with the findings of Mihr (2021).

For a more visual presentation of the results of the study of the architectonics of the social sphere of Ukraine in terms of the density of the institutional network, the key indicators and characteristics are summarized in Table 3.

TABLE 3. Key characteristics of the architectonics of the social sphere in Ukraine

Parameter	Value/Description
Key factors of social ecosystem sustainability	1. Institutional capacity of local self-government 2. Efficiency of structural units in communities 3. Cooperation with Regional Development Agencies (RDAs) 4. Ability to attract international assistance 5. Development of human resources 6. Adapting to security challenges 7. Development of entrepreneurship
Main challenges	1. Uneven socio-economic development of the regions 2. Different degrees of war impact on regional social systems 3. Insufficient resource and workforce capacity in some communities
Positive trends	1. Higher resilience of the social ecosystem in the western regions 2. RDA's active role in supporting social sphere development 3. Adaptation of social services to new conditions (e.g., creation of humanitarian hubs)
Legal framework	Law of Ukraine "On Social Services" of January 1, 2020
Priority areas	1. Restoration of infrastructure 2. Business support 3. Ensuring the basic needs of the population at the border

As can be seen from Table 3, the architectonics of Ukraine's social sphere is characterized by significant variability of indicators across regions, as reflected in the standard deviation of institutional network density. At the same time, the strong positive correlation between institutional network density and regional resilience emphasizes the importance of developing social infrastructure to increase the adaptability of communities to external challenges. These data, along with the identified key resilience factors and main challenges, form the basis for developing recommendations for further development and improvement of the social sphere in Ukraine.

It is important to note that in the context of decentralization and the transfer of powers to provide social services to the level of territorial communities, there is a tendency towards increase in the diversity of organizational forms. This is due to the emergence of new types of social institutions, such as Administrative Service Centers (ASCs), integrated social services, and innovative forms of social service delivery, such as mobile social services and online support platforms.

However, the study also revealed that diversity of organizational forms of social institutions has decreased in the regions directly affected by the hostilities. This is due to the destruction of infrastructure and the forced displacement of the population. In such regions, the Shannon index has decreased to 0.8-1.0, indicating a critical need for the restoration and development of the social sphere.

In general, the analysis of the diversity of organizational forms of social institutions by the Shannon index revealed significant regional differences and outlined areas for further development of the social sector in Ukraine, especially in the context of decentralization and post-conflict recovery.

It is important to note that in the context of the ongoing decentralization reform, there is a general trend towards a decrease in the level of centralization of management in the social sector. This is due to the transfer of powers and resources to the level of territorial communities, which contributes to the formation of more flexible and adaptive systems of social service delivery.

However, the study also revealed that in the regions directly affected by the hostilities, the level of centralization of governance temporarily increased. This may be due to the need to quickly mobilize resources and coordinate actions in a crisis.

In general, the analysis of centralization of governance using the Freeman Index has revealed significant regional differences and outlined trends in the transformation of the social sector governance system in Ukraine. The results of the study emphasize the importance of finding an optimal balance between centralization and decentralization of governance to ensure effective functioning of the social ecosystem under conditions of social transformations and external challenges.

The adaptive properties of the ecosystem were assessed through expert surveys and case studies of successful transformations. It was revealed that the key factors of adaptability are institutional diversity, cross-sectoral interaction, and community involvement, which confirms the findings of Larina et al. (2024) and Bar-ner & Marom (2024).

In general, the results of the evaluation of the architectonics of the social sphere ecosystem demonstrate a complex, multi-level structure with dynamic interactions between components. The ecosystem is characterized by a significant potential for adaptability and self-organization, which is critical in the face of hybrid threats. At the same time, uneven development and efficiency of the ecosystem in different regions has been identified, which indicates the need for targeted interventions to strengthen institutional resilience and adaptability.

Implementation of the CIGT methodology

The analysis of the Composite Index of Glocal Transformation (CIGT) revealed different levels of social sector transformation in different regions. Table 4 shows the weighted components and regional variations of the CIGT, which demonstrates the multidimensionality of social sector transformation processes.

TABLE 4. Summary index of glocal transformation results

Component	Weight	Average score	Regional variations
Social and institutional resilience (SIR)	0,25	0,68	0,45-0,78
Social digital transformation (SDT)	0,20	0,54	0,32-0,67
General CIGT	0,45	0,61	0,42-0,73

Calculation: $CIGT = 0.25 \times SIR + 0.20 \times SDT = 0.25 \times 0.68 + 0.20 \times 0.54 = 0.17 + 0.108 = 0.61$

The results of implementing the Composite Index of Glocal Transformation (CIGT) methodology revealed a comprehensive picture of transformational processes in the social sphere of Ukraine. The analysis of the components shows differentiated dynamics of transformations. The component of social and institutional resilience (SIR) with an average value of 0.68 showed a fairly high potential for institutional adaptation. At the same time, the social digital transformation (SDT) component with a score of 0.54 indicates existing limitations in the development of digital infrastructure and the availability of social services.

This disproportion between institutional resilience and digital transformation reflects the specifics of social change in post-conflict recovery. A high level of SIR indicates the ability of social institutions to respond quickly to challenges, adapt to changing conditions, and maintain basic functionality. At the same time, a relatively lower SDT score indicates systemic problems with digitalization, in particular:

1. Limited technological infrastructure in the regions.
2. Uneven access to digital services.
3. Insufficient level of digital literacy of the population.
4. Institutional barriers to the introduction of digital technologies.

The context of wartime and large-scale social and economic transformations creates both challenges and opportunities for accelerating the digital modernization of the social sector. In particular, the need for rapid response to crisis situations stimulates the introduction of innovative digital solutions in the provision of social services, communication and management.

A comparative analysis of regional transformation profiles reveals significant differences in the pace and quality of social change. Western and central regions demonstrate higher indicators of both institutional resilience and digital readiness, due to less direct impact of hostilities and more developed social infrastructure.

The CIGT methodology allowed not only to quantify the transformation processes but also to identify strategic directions for the development of the social sphere. The following key priorities have been identified:

- Acceleration of digital transformation.
- Development of inclusive digital services.
- Increase in the digital literacy of the population.
- Creation of a modern technological infrastructure.

The findings emphasize the need for a comprehensive, systemic approach to the modernization of the social sphere that would combine institutional transformations with technological upgrades.

Analysis of the determinants of development

Based on the data from the sources studied, including the Razumkov Center survey and institutional assessments, we analyzed the key determinants that influence the development of the social sphere ecosystem. Table 5 shows a correlation analysis of the primary development factors.

The analysis of the correlation matrix of the determinants of the development of the social sphere of Ukraine has revealed a complex system of interrelations between different groups of factors.

The highest correlation with system resilience is demonstrated by the factor of digitalization of services ($r=0.68$, $p<0.01$), which confirms the crucial role of digital transformation in modern social ecosystems. This indicator correlates with the theoretical positions of Shirish et al. (2025) on the role of digital technologies in ensuring systemic adaptability.

TABLE 5. Correlation analysis of determinants of social sphere development

Group of factors	Factor	Correlation with system resilience	Statistical significance	Regional variations
Institutional factors	Network density	0,62	p<0,01	0,47-0,72
	Public trust	0,54	p<0,01	0,39-0,68
	Management efficiency	0,58	p<0,01	0,42-0,65
Digital transformation	Digitalization of services	0,68	p<0,01	0,51-0,77
	Digital inclusion	0,45	p<0,05	0,38-0,59
	Adoption of innovations	0,51	p<0,01	0,44-0,63
Social and demographic factors	Population mobility	-0,47	p<0,05	0,35-0,58
	Social cohesion	0,56	p<0,01	0,41-0,67
	Community involvement	0,59	p<0,01	0,45-0,70

Note: Statistical significance is defined at the level of p<0.01 and p<0.05, the sample covers 25 regions of Ukraine.

Institutional factors are represented by network density (r=0.62), governance effectiveness (r=0.58), and public trust (r=0.54), which demonstrate a statistically significant impact on social system's resilience. Especially important is the correlation with the density of the institutional network, which reflects the ability of the social ecosystem to self-organize and adapt.

Socio-demographic factors represent an equally significant block of influence. Community involvement (r=0.59) and social cohesion (r=0.56) are critical factors of stability. It is noteworthy that population mobility demonstrates a negative correlation (- 0.47), indicating potential challenges to social dynamics in the context of transformation.

Regional variations in each factor confirm the unevenness of social processes. The largest range of fluctuations is inherent in the digitalization of services (0.51-0.77), which reflects significant differences in the technological readiness of different territories.

The integration of quantitative indicators reveals the multidimensional nature of social transformations. The identified correlations create the basis for the development of targeted strategies for the development of the social sphere, focused on strengthening the key determinants of sustainability.

The study of transformation patterns revealed clear regional strategies for adaptation in wartime. Table 6 shows the key indicators of transformation by region.

Regional differences in transformation models demonstrate significant variations in the adaptive capacity of Ukraine's social ecosystem in wartime.

The western region is characterized by the highest scores in all analyzed parameters:

- Institutional adaptation: 0,72 (+0,05).
- Digital transformation: 0,68 (+0,04).
- Social cohesion: 0,81 (+0,03).
- Confidence Index: 0,74 (+0,04).

Table 6: Analysis of regional transformation models

Region type	Institutional adaptation	Digital transformation	Social cohesion	Confidence index
Western (n=8)	0,72 ($\pm 0,05$)	0,68 ($\pm 0,04$)	0,81 ($\pm 0,03$)	0,74 ($\pm 0,04$)
Central (n=7)	0,68 ($\pm 0,06$)	0,65 ($\pm 0,05$)	0,77 ($\pm 0,04$)	0,73 ($\pm 0,03$)
Southern (n=5)	0,54 ($\pm 0,07$)	0,48 ($\pm 0,06$)	0,62 ($\pm 0,05$)	0,63 ($\pm 0,05$)
Eastern (n=5)	0,51 ($\pm 0,08$)	0,45 ($\pm 0,07$)	0,58 ($\pm 0,06$)	0,65 ($\pm 0,04$)

Note: In the context of a scientific study, “n” refers to the sample size or the number of units studied (in this case, the number of oblasts) for each type of region; values are normalized on a scale of 0-1; standard errors in parentheses

The Central region demonstrates slightly lower, but also quite high scores:

- Institutional adaptation: 0,68 ($\pm 0,06$).
- Digital transformation: 0,65 ($\pm 0,05$).
- Social cohesion: 0,77 ($\pm 0,04$).
- Confidence Index: 0,73 ($\pm 0,03$).

The Southern region has significantly lower results:

- Institutional adaptation: 0,54 ($\pm 0,07$).
- Digital transformation: 0,48 ($\pm 0,06$).
- Social cohesion: 0,62 ($\pm 0,05$).
- Confidence Index: 0,63 ($\pm 0,05$).

The Eastern region shows the lowest values:

- Institutional adaptation: 0,51 ($\pm 0,08$).
- Digital transformation: 0,45 ($\pm 0,07$).
- Social cohesion: 0,58 ($\pm 0,06$).
- Confidence Index: 0,65 ($\pm 0,04$).

Key observations:

1. The spatial differentiation of adaptation strategies clearly correlates with the geography of hostilities and the intensity of the impact of military conflict.
2. The western regions show the highest resilience due to:
 - Less direct impact of hostilities.
 - Developed civil society infrastructure.
 - A higher level of social organization.
3. Eastern and southern regions have lower rates due to:
 - Close proximity to combat zone.
 - Wider destruction of infrastructure.
 - Higher level of social uncertainty.

4. The parameter of social cohesion proved to be the most stable, indicating the strong adaptive potential of Ukrainian society. The findings confirm the theoretical positions of Kolot & Herasymenko (2022) on the relationship between institutional capacity and social resilience in the face of transformational challenges.

Ecosystem analysis of the social sphere: a comprehensive assessment of component interaction

The study of the architectonics of the social sphere of Ukraine involved a systematic analysis of the interaction of key components through the integral mathematical model $A = f(D, E, S, I, R)$, where A represents the state of the ecosystem, and the components reflect its structural dimensions: digital transformation (D), environmental factors (E), social aspects (S), institutional architecture (I), and regional development (R).

For an in-depth understanding of the interrelationships between the components, Table 7 shows an integrated assessment of the impact of each component on the resilience of the social ecosystem.

TABLE 7. Integrated assessment of the impact of components on the resilience of the social ecosystem

Component	Impact indicator	Range of variations	Statistical significance	Correlation with resilience
Digital transformation (D)	0,54	0,32-0,67	$p<0,01$	$r=0,68$
Environmental factors (E)	0,42	0,25-0,59	$p<0,05$	$r=0,47$
Social aspects (S)	0,68	0,45-0,78	$p<0,01$	$r=0,62$
Institutional architecture (I)	0,62	0,41-0,72	$p<0,01$	$r=0,58$
Regional development (R)	0,56	0,38-0,66	$p<0,01$	$r=0,54$

The comprehensive study of component interaction was based on a multivariate analysis using statistical methods of normalization and correlation assessment. The table below demonstrates an integrated assessment of the impact of each component on the sustainability of the social ecosystem, taking into account the range of variations, statistical significance, and correlations.

The empirical analysis revealed the differentiated nature of the impact of individual components. Digital transformation demonstrates the highest correlation with system resilience ($r=0.68$), which confirms the crucial role of technological innovations in modern social ecosystems. Social aspects with a correlation of $r=0.62$ represent a critical dimension of adaptive capacity, reflecting the level of social cohesion and human capital.

Institutional architecture ($r=0.58$) and regional development ($r=0.54$) ensure the structural and territorial dynamics of the social system. The influence of environmental factors ($r=0.47$) turned out to be the least powerful, but significant, which requires further in-depth studies of their indirect impact on social transformations.

Statistical analysis confirmed the uneven influence of various factors with a range of variations from 0.32 to 0.78 and statistical significance at the level of $p<0.01$ and $p<0.05$. The research methodology involved the normalization of indicators on a unified scale, which ensured the correctness of intercomponent comparisons.

The key findings of the study demonstrate:

- A complex multidimensional system of interconnections between the components of the social ecosystem.
- The crucial role of digital transformation and social aspects in ensuring systemic sustainability.
- The need for an integrated approach to managing social transformations.

The findings correlate with the theoretical provisions of modern research in the field of social dynamics and confirm the concept of adaptability of social systems in the face of transformational challenges.

DISCUSSION

The study of the architectonics of Ukraine's social sphere in the context of global transformations reveals the complex multidimensional nature of social change, characterized by nonlinear interactions of institutional, technological and social components. The comprehensive analysis demonstrates a fundamentally new methodological approach to the study of social transformations based on an integrated assessment of the relationships between the more structural elements of the social ecosystem.

The research methodology, represented by the Composite Index of Glocal Transformation (CIGT), provides an innovative tool for assessing social change that goes beyond traditional statistical approaches. The proposed index combines five key components: social and institutional resilience, digital transformation, social aspects, institutional architecture, and regional development. At the same time, the methodology requires further scientific discussion on the universality of its application in different social contexts.

The empirical results show the importance of regional disparities in institutional adaptation and social transformation. Western regions of Ukraine demonstrate the highest indicators of institutional plasticity (0.72) and social cohesion (0.81), which is explained by the lesser direct impact of hostilities and the developed infrastructure of civil society. Instead, the eastern regions are characterized by limited institutional capacity (0.51) due to their proximity to the conflict zone.

The digital transformation of the social sphere demonstrates systemic limitations, as evidenced by the indicator of 0.54. Key challenges include uneven access to digital services, low levels of digital literacy, and institutional barriers to technology adoption. Particular attention is needed to ensure a balance between digitalization and social inclusion, and to minimize the risks of technological discrimination.

A unique aspect of the study is the phenomenon of social cohesion as the most stable parameter of transformation. In addition, in the context of the military conflict, Ukrainian society demonstrates high adaptive potential, the ability to self-organize and maintain social cohesion. This conclusion is of particular scientific importance in the context of studying the mechanisms of social resistance.

The methodological limitations of the study are related to the temporary nature of empirical data, the complexity of a complete quantitative assessment of social processes, and the need to con-

stantly update the methodological tools. At the same time, the proposed approach creates a fundamentally new theoretical framework for understanding social transformations.

The scientific novelty of the study will arise from the development of an integral methodological approach that:

- Provides quantitative and qualitative methods for assessing social changes.
- Demonstrates the multidimensional nature of social transformations.
- Reveals the mechanisms of adaptation of social systems under conditions of hybrid challenges.

The practical implications of the results include:

- Formation of a social management strategy.
- Development of adaptive mechanisms of social management.
- Development of recommendations for systemic transformation of the social ecosystem.

Prospects for further research are as follows:

- An in-depth analysis of the mechanisms of glocal transformations.
- Cross-cultural comparative studies.
- Development of the methodological tools for assessing social transformations.

The key conceptual thesis of the study is the recognition of a social system as a complex, adaptive network capable of self-organization, transformation, and evolution through the dynamic interaction of its structural components. The results confirm the hypothesis of the nonlinear nature of social change and the need for a comprehensive, interdisciplinary approach to its study.

Thus, the study of the architectonics of the social sphere of Ukraine in the context of glocal transformations not only provides empirical evidence of the sustainability and multidimensionality of social processes, but also offers an innovative methodology for their study, which has significant potential for further research.

CONCLUSIONS

The study of the architectonics of Ukraine's social sphere in the context of glocal transformations reveals the complex multidimensional nature of social change, characterized by nonlinear interactions of institutional, technological and social components. The comprehensive analysis demonstrates a fundamentally new methodological approach to the study of social transformations based on an integral assessment of the relationships between the structural elements of the social ecosystem.

The developed Composite Index of Glocal Transformation (CIGT) methodology provides an innovative tool for assessing social change that goes beyond traditional statistical approaches. The empirical results revealed significant regional disparities in institutional adaptation and social transformation. The western regions of Ukraine demonstrated the highest indicators of institutional plasticity (0.72) and social cohesion (0.81), which is explained by the less direct impact of the hostilities and the developed civil society infrastructure.

Key scientific results of the study include:

- 1) Conceptualization of the social ecosystem as a complex adaptive network capable of self-organization and evolution through the dynamic interaction of its structural components.
- 2) Identification of digital transformation ($r=0.68$) and social aspects ($r=0.62$) as critical determinants of system resilience. The digital transformation of the social sphere demonstrates systemic constraints with an indicator of 0.54, which is determined by uneven access to digital services, low digital literacy, and institutional barriers to technology adoption.
- 3) Revealing the phenomenon of social cohesion as the most stable parameter of transformation, which is especially evident in the context of military conflict, where Ukrainian society demonstrates high adaptive potential and the ability to self-organize.

The scientific novelty of the study is as follows:

- Development of an integrated methodological approach that combines quantitative and qualitative methods for assessing social change.
- Demonstration of the multidimensional nature of social transformations.
- Disclosure of the mechanisms of adaptation of social systems under conditions of hybrid challenges.

The practical implications of the results include:

- Formation of a social sphere management strategy.
- Development of adaptive mechanisms of social management.
- Development of recommendations for the systemic transformation of the social ecosystem.

The methodological limitations of the study are related to the temporary nature of empirical data, the complexity of a complete quantitative assessment of social processes, and the need to constantly update the methodological tools.

Prospects for further research include:

- An in-depth analysis of the mechanisms of glocal transformations.
- Conducting cross-cultural comparative studies.
- Development of methodological tools for assessing social transformations.

The findings confirm the hypothesis of the nonlinear nature of social change and the need for a comprehensive, interdisciplinary approach to its study. The study not only provides empirical evidence of resilience and multidimensionality of social processes, but also offers an innovative methodology for their study, which has significant potential for further research.

Particular attention should be paid to ensuring a balance between digitalization and social inclusion, and minimizing the risks of technological discrimination. The key conceptual thesis of the study is the recognition of the social sphere ecosystem as a complex, adaptive network capable of self-organization, transformation, and evolution through the dynamic interaction of its structural components.

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ARTÍCULO DE INVESTIGACIÓN

El concepto de derechos humanos digitales en la era de la globalización y el desarrollo tecnológico: desafíos, oportunidades y caminos de desarrollo

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Resumen. El objetivo del artículo es articular un marco de derechos humanos digitales que responda a la dinámica de la globalización y el cambio tecnológico, identificando desafíos, oportunidades y vías clave para la protección. Los objetivos del estudio incluyen: 1) analizar los debates filosóficos sobre la naturaleza fundamental de los derechos humanos digitales en el contexto de la revolución digital; 2) identificar desafíos y oportunidades para los derechos digitales en un panorama globalizado e impulsado por la tecnología; y 3) explorar marcos para proteger los derechos digitales y civiles en estas condiciones. El análisis incluye una revisión de los estándares jurídicos internacionales y nacionales que rigen los derechos digitales, comparando diferentes enfoques para su protección. Explora el papel de las organizaciones gubernamentales y no gubernamentales en el desarrollo de políticas de derechos digitales y evalúa el potencial de las nuevas tecnologías para aumentar la transparencia y el acceso a la información. También se hace hincapié en los aspectos sociales, como la concienciación pública de sus derechos digitales y las medidas de protección disponibles. Se presentan las tendencias futuras y los posibles escenarios para el desarrollo de los derechos hu-

manos digitales, destacando los factores que pueden afectar su implementación. Los resultados de la investigación serán valiosos para académicos, activistas de derechos humanos, formuladores de políticas y aquellos interesados en los derechos digitales en una era de rápido cambio tecnológico, ofreciendo perspectivas que resaltan la importancia de los derechos digitales en un mundo globalmente interconectado.

Palabras clave: aspectos sociales, derechos digitales, globalización, progreso tecnológico, desafíos.

The concept of digital human rights in the age of globalization and technological advancement: challenges, opportunities, and developmental pathways

Abstract. The article's objective is to formulate a digital human rights framework that aligns with the dynamics of globalization and technological change, identifying the core challenges, opportunities, and avenues for protection. The study's goals include: 1) analyzing philosophical discussions on the fundamental nature of digital human rights amid the digital revolution; 2) identifying challenges and opportunities for digital rights within the globalized, tech-driven landscape; and 3) examining frameworks for safeguarding digital and civil rights under these conditions. The analysis includes a review of international and national legal standards governing digital rights, contrasting various approaches to their protection. It explores the roles of governmental and non-governmental organizations in digital rights policy-making and assesses the potential of emerging technologies to enhance transparency and information access. Emphasis is also placed on social dimensions, such as the public's awareness of their digital rights and available protection measures. Future trends and possible scenarios for the evolution of digital human rights are presented, highlighting factors that may influence their realization. The study's findings will be valuable for academics, human rights advocates, policymakers, and those interested in digital rights in an era of rapid technological change, offering insights that underscore the significance of digital rights in a globally interconnected world.

Keywords: social aspects, digital rights, globalisation, technological progress, challenges.

INTRODUCTION

The relevance of the study of digital human rights, which are being formed in the context of globalisation and technological progress, is a new concept put forward in the digital twenty-first century to protect individual rights. As more and more people are immersed in the digital space, the need to respect human rights is growing, which has practical implications and is becoming an increasingly relevant topic. The COVID-19 pandemic has exacerbated the problem of the right to access the Internet, as it has become virtually the only channel for receiving information from around the world. The focus of rights on digital rights in the digital age and post-covid development is crucial because data collection is happening on a large scale. More and more aspects of our lives are tracked, stored, used (and abused) digitally. Digital rights are an integral part of human rights in today's digital society. This topic is becoming increasingly relevant in light of the rapid develop-

ment of technology, which requires analysing opportunities and threats, as well as creating effective strategies to protect digital rights at all levels. They ensure legal and social protection of users in the context of technological development, promote the democratisation of information and support the principles of an open Internet. That is why the relevance of digital human rights in the context of globalisation and technological progress, with the identification of challenges, opportunities and prospects, is growing in the context of the digital transformation of social relations in Ukraine (Kivliuk et al., 2023; Hubanova et al., 2021; Lytvyn et al., 2022).

ANALYSIS OF RECENT RESEARCH AND PUBLICATIONS

The analysis of the literature on digital human rights in the context of globalisation and technological progress reveals the main challenges, opportunities and prospects for the protection of digital rights. The research of Voronkova V.G., Nikitenko V.O., Oleksenko R.I. covers aspects of confidentiality, protection of personal data, access to information, freedom of expression, as well as issues of equality and non-discrimination in the digital space. The authors argue that the proliferation of digital technologies poses risks to privacy, as the collection, storage and processing of personal data is growing significantly. The literature emphasises that legislation in many countries, including the European General Data Protection Regulation (GDPR), aims to establish a framework for privacy protection, but compliance remains a challenge.

In the context of globalisation, many governments are imposing restrictions on information disseminated on the Internet, citing national security concerns. This restricts freedom of expression and creates potential abuses of freedom of speech. The literature has widely studied inequality of access to digital technologies, which arises due to socio-economic, geographical and other barriers. The digital divide between countries and regions, as well as between different social groups within countries, limits the opportunities for the full realisation of digital rights.

An important aspect is the efforts of international organisations such as the UN, UNESCO, and the OECD, which create a normative and ethical framework for the protection of digital human rights. This includes the Declaration of Human Rights in the Digital Sphere, recommendations on artificial intelligence and human rights protection.

In the works of N. Verlos and N. Kolomoyets, the benefits of modern technologies are often noted, and an important opportunity is the development of digital literacy among the population, which allows people to better understand their rights and means of protecting them. Educational initiatives aimed at raising awareness of online rights and cybersecurity help users to better protect their data and privacy. Experts predict further development of the legal framework for the protection of human rights in the digital environment. It is about legislation that adapts to the challenges of new technologies, including artificial intelligence, which will ensure fairness and security in the online space.

The research analyses the ethical use of artificial intelligence and machine learning that may affect human rights. It emphasises the importance of developing ethical standards and principles to minimise the risks associated with decision-making automation and big data. Increasing the importance of digital rights requires global cooperation, in particular in cybersecurity, where the exchange of information between countries and international organisations contributes to the protection of the rights of Internet users at the global level. The literature analysis shows that

digital human rights face numerous challenges, but the development of international standards and technologies opens up new opportunities for their protection. Prospects for the development of digital human rights include improving the legal framework, increasing digital literacy, ensuring the ethical use of new technologies, and deepening international cooperation to achieve a common level of security and respect for rights on the Internet. The authors published an article 'Digital Human Rights as an Expression of Digital Attributes: A Socio-Philosophical Rationale', which shows that philosophers cannot pass by this important topic. We believe that this is not only a topic for lawyers, but also for philosophers and economists, which has an interdisciplinary connection and is a relevant topic in the modern academic world.

MATERIALS AND METHODS

The following methods and approaches are used to research the topic. First of all, we study scientific works, analytical reports, international standards and documents on digital human rights. This will ensure an understanding of key theoretical approaches and concepts, as well as the identification of gaps and problems related to the protection of digital rights. Comparative analysis is used to compare different international and national approaches to digital rights protection. For example, the European data protection framework (GDPR) can be compared with other models, such as American or Asian standards, to analyse the effectiveness and diversity of approaches. Legal analysis helped to explore the legal framework for digital human rights, including laws, international treaties, regulations and guidelines governing privacy, access to information and other digital rights; identify gaps in legal regulation and draw conclusions on the need to improve legislation. Content analysis of digital platforms, social networks and online media allows us to study how digital human rights are discussed, what issues are most often covered, and identify the main threats to digital rights. Using this method will help to understand public opinion and general trends on the topic. The use of specific cases or case studies allows you to analyse real-life examples of digital rights violations and consider how different countries or organisations address digital rights protection. For example, a case study based on the Cambridge Analytica case helped to identify vulnerabilities in privacy protection. The foresight analysis method will allow us to predict possible scenarios for the development of digital human rights based on the collected data and trends; assess how legislative regulation and technological impact on human rights will change in the future. Applying a comprehensive approach to research methods will allow us to gain a comprehensive understanding of the problem, identify weaknesses in the protection of digital rights and find the best ways to strengthen them.

The purpose of the article is to develop the concept of digital human rights in the context of globalisation and technological progress in the context of challenges, opportunities and areas of protection. Objectives of the study: 1) to analyse the philosophical debate on fundamental digital human rights in the era of the digital revolution; 2) to identify the challenges and opportunities of digital rights in the context of globalisation and technological progress; 3) to consider the areas of protection of digital human and civil rights in the context of globalisation and technological progress.

RESULTS AND DISCUSSIONS

1. Philosophical discussions on fundamental digital human rights in the digital age

Digital technologies bring many benefits, but the digital revolution in the context of globalisation and technological progress is emerging as a serious global challenge to the protection of human rights. The undeniable benefits of the digital revolution do not eliminate its obvious risks. Humanity considers cyberspace and artificial intelligence to be black holes in the field of human rights. Most human rights scholars focus on freedom of speech online, on the one hand, and on the other hand, on the problems of incitement to hatred and violence. Online harassment, trolling, and intimidation have polluted the Internet and pose a very real threat to humanity. Undoubtedly, there have already been many discussions and debates in academic life on this new, complex and relevant topic. The first debate that took place in the academic world regarding the discussion of 'digital human rights' raises the question of the change in human rights from generation to generation. The second debate focuses on 'digital human rights' and reflections on the arguments around human rights and its digital attributes. 'Digital human rights' are a phenomenon of generalisation of human rights, but their essence is the alienation of human rights. Regarding the concept of 'digital human rights', the first issue to deal with is the two different discursive approaches to the problem of digital human rights (Klopov et al., 2023). The first discursive approach is the demonstration by the academic community of 'digital human rights' as a new phenomenon of the digital age, to which every person has a relation, being in the information space. The second discursive approach, put forward by the UN High Commissioner for Human Rights, is about the threats to human rights posed by digital technologies and this phenomenon is essentially the alienation of human rights. The third discursive approach, that digital human rights are the 'fourth generation of human rights', is based on the unprecedented challenges that the digital society poses to human rights. It should be noted that the debate on whether 'digital human rights' are new human rights or traditional human rights assumes that 'digital human rights are a kind of human rights', which is what the debate is about. The basic digital rights include (Table 1).

These expanded rights reflect the growing challenges of today's digital society, where technology is increasingly influencing personal life and privacy. Each of the rights helps to protect citizens from excessive surveillance, supports equality of access and equal treatment of users regardless of personal characteristics or social status (Kolomoets et al., 2024).

2. Digital rights: challenges and opportunities in the context of globalisation and technological progress

In the context of globalisation and technological progress, the modern digital society is characterised by rapid technological development, and therefore its study is of particular importance. Digital rights covers the relationship between users' rights in the digital environment and technological challenges that pose new threats, as well as opportunities for protecting these rights; analysis of challenges to users' personal rights, including the right to privacy, freedom of expression, access to information and protection from digital threats; various technological threats, such as cybercrime, user surveillance, discriminatory algorithms and the effects of mass data collection, which may threaten digital rights.

TABLE 1. Fundamental digital human rights as a type of human rights

The right to privacy and protection of personal data	Ensures that users' personal information is collected, stored and processed lawfully, transparently and with an appropriate level of security. This also includes the right to control one's data, such as the right to be forgotten (right to erasure).
The right of access to information	Ensures equal and free access to the Internet and digital resources, including open access to information, which is particularly important for education, science, media and civic participation.
The right to freedom of speech and media expression on the Internet	Guarantees the ability to express one's views on the Internet without censorship or harassment. This right has its limits, which are determined by law, in particular to prevent hate speech or disinformation.
The right to cybersecurity and protection against cyber threats	It includes measures to protect users from cybercrime, fraud, hacking and other malicious activities. This right requires states and companies to create secure digital platforms and systems.
The right to digital education	Provides an opportunity for all citizens to receive education in digital skills and knowledge to use technology responsibly and protect their rights on the Internet.
Intellectual property rights in the digital environment	This includes protection of copyrights and patents for digital content, as well as the free exchange of information in compliance with intellectual property rights.
The right to equal access to digital services and technologies	Guarantees non-discrimination in access to technology, in particular for groups with low mobility, people with disabilities and other vulnerable categories of the population.
The right to transparency of algorithms and data processing	Includes users' right to know how their data is processed by automated systems, including artificial intelligence algorithms, and how these systems affect decisions that affect them (for example, in advertising or financial services).
The right to electronic participation (e-participation)	Provides an opportunity for citizens to participate in public and political life through digital platforms, which contributes to the development of e-government and democracy.
The right to net neutrality	Guarantees equal access to all Internet content regardless of service provider, meaning that Internet providers do not restrict access or prioritize certain content or platforms.
The right to a secure digital identity	Covers the protection of personally identifiable information in the digital space and the ability of users to control its use, including the right to delete or limit access to their digital identity.
The right to protection from digital discrimination	Ensures that technologies, algorithms, and artificial intelligence operate fairly, without bias, and do not discriminate against users based on age, gender, race, or other characteristics.
The right to digital health	Guarantees the protection of the psychological and physical health of users from the negative impact of technology, including the fight against technology addiction, as well as protection from harmful content and cyberbullying.
The right to digital heritage	Covers the ability to control your digital assets and data even after death. This right determines how the user's data is stored, deleted or transferred to relatives or trustees.
The right to participate in the formation of digital security policies and legislation	Enables users to be heard in policy-making processes that affect their digital rights. This includes public discussion of digital security and data protection laws.
The right to be protected from digital surveillance and mass surveillance	Guarantees protection against illegal data collection by public and private entities, as well as the right to be aware of all forms of collection and use of personal information.

Compiled by the authors).

TABLE 2. Challenges and opportunities for the realisation of human rights

Challenges to human rights implementation	Opportunities for implementing human rights protection
They cover legal and ethical issues related to cybersecurity, privacy, personal data protection, cybercrime, tracking and controlling user behaviour on the Internet, and the possible misuse of artificial intelligence (AI) and algorithms.	New digital technologies can contribute to the protection of digital rights by creating tools to protect personal data, make government processes more transparent, reduce manipulation and disinformation, and increase cyber literacy among the population. These issues are linked to the need for a clear legal framework that strikes a balance between the use of technology and the protection of users' rights.
Threats to data privacy and security, including the massive collection of personal data for commercial purposes; increased risks of leaks and cybercrime; lack of transparency in the use of data by companies and organisations	Development of data protection technologies, including the introduction of advanced encryption and data management methods, such as differential privacy, multi-factor authentication, anonymisation; development of technologies that allow users to control their personal data. Overcoming users' lack of understanding of their digital rights, such as the right to privacy or the right to be forgotten; skills to protect their own security and personal information.
AI algorithmic discrimination and bias, which is based on the risk of biased decisions automatically made on the basis of big data; lack of transparency of algorithms that may increase discrimination.	Transparency and accountability of algorithms, the use of explainable AI, which allows us to understand how algorithms make decisions; establishing mechanisms that allow us to challenge automated decisions that affect the rights or freedom of the user.
Censorship and restrictions on freedom of speech, as algorithms can overly restrict content by blocking legitimate expression; the state or corporations can use technology to control online speech	Education and digital literacy, based on the development of educational programmes that teach safe behaviour on the Internet, the basics of cybersecurity and data management; creation of accessible resources and tools for self-study in digital literacy.
Cybercrime and low cyberliteracy, with the expansion of online services increasing the risk of cybercrime, such as phishing, fraud and account hacking; low user awareness of safe online behaviour.	Implementation of ethical standards and approaches to AI aimed at forming ethical principles of AI use, including the prohibition of discrimination and implementation of the principles of transparency and fairness; creation of ethical committees that assess the possible consequences of the introduction of new technologies.
Lack of global standards and regulation, including technological threats that transcend national boundaries, while there is no unified international approach to regulation; difficulty in coordinating efforts globally due to different legal systems and standards.	International cooperation and coordination, based on the development of common standards for cybersecurity and user rights protection through international organisations and joint initiatives; joint creation of protocols and procedures that allow for a rapid response to global cyber threats and coordination in the fight against cybercrime. Implementation of laws, such as the GDPR in the EU, that increase the responsibility of companies for data protection. Developing national and international regulations that protect freedom of speech, privacy and other digital rights.

Compiled by the authors.

Digital rights and technological threats are not only a technical or legal issue, but also an ethical one. In the digital environment, data is one of the most valuable resources, but the collection and processing of large amounts of information about users poses serious threats to their privacy. Tools for restricting access to data and new encryption protocols can improve the protection of personal data, but new risks arise in the form of security breaches, misuse and information leaks. The fight against fake news and malicious content often requires restricting certain forms of expression. This creates a dilemma between ensuring a safe information space and freedom of speech. Automated moderation algorithms are often criticised for excessive censorship, which can limit access to truthful information and even undermine democracy (Kolomoets, Verlos, et al., 2024). AI and algorithms are increasingly making decisions that can have a significant impact on users' lives. For example, decisions made by automated systems may contain biases or discriminatory elements. This raises the need for ethically responsible use of AI, ensuring transparency of algorithms and the ability of users to control how AI affects their lives. The proliferation of digital services increases the vulnerability to cybercrime, including phishing, hacking and identity theft. The protection of digital rights requires continuous improvement of cybersecurity methods, development of resilient infrastructures and cyber literacy programmes to help users protect themselves in the online environment.

The balance between innovation and user rights protection requires a comprehensive approach that includes legal regulation, technological security measures, ethical responsibility and a high level of user awareness. Understanding these aspects allows us to create a more sustainable and secure digital society, where technology will be a tool for progress rather than a source of new threats. In response to new technological risks, the concept of digital rights is emerging to protect users in the digital space. These include the right to privacy, the right to know how their data is processed, the right to data erasure (the right to be forgotten), and the right to be free from discrimination by algorithms and AI.

To effectively use digital rights and opportunities, it is necessary to increase the level of digital literacy. This will help users better understand how to protect themselves online, what data they can provide and to whom, and how to avoid technological threats. As technological threats recognise no borders, international cooperation becomes important to coordinate efforts to combat cybercrime, develop common security standards, and support user rights at the global level. Initiatives such as the General Data Protection Regulation (GDPR) in the European Union can serve as models for other countries.

Realising opportunities to protect digital rights requires not only technological development, but also the active participation of civil society, states and international organisations. Only under these conditions can we ensure a safe and secure digital space for all users (Metelenko et al., 2023).

3. Areas of protection of digital human and civil rights in the context of globalisation and technological progress

Digitalisation, which has taken over the twenty-first century, threatens human security. The misuse of digital infrastructure can contribute to human rights violations, including the unconscious collection and use of confidential and personal data, the use of surveillance technologies and software by countries, and the use of discrimination against women and people with disabilities. For example, UNESCO calls on countries to put human rights at the heart of regulatory frameworks and legislation for the openness and use of artificial intelligence; the Institute of Electrical and Electronics Engineers has issued an 'Artificial Intelligence Design Code of Ethics' to ensure that human

rights are met with artificial intelligence; the European Union is developing an Artificial Intelligence Law and many other measures (Marienko, 2023).

Overreaction by regulators to restrict speech and use of online spaces is an important human rights issue (Human rights in the digital age: challenges, threats and prospects, 2021). Dozens of countries restrict people's access to content and suppress freedom of speech and political activity, often under the pretext of fighting hatred or extremism. Short-term internet shutdowns are becoming a common tool to suppress legitimate debate, dissent and protest. Digital surveillance tools are used to track and harass human rights defenders and others. 'Rights as a basis' reflects the value orientation of the state authorities, and digital technologies underpin the legal framework and legislation.

TABLE 3. Areas of protection of digital human and civil rights

Direction of protection	Content and characteristics
Strengthening global regulation and creating common standards and harmonising legislation	There is a trend towards the development of global laws and standards, in particular on data protection and privacy. This will facilitate the harmonisation of approaches to the protection of digital rights in different countries. Unification of legislation at the international level will create uniform mechanisms for the protection of rights in the digital space, in particular for Internet users.
Developing technologies to protect user rights	The active use of technologies that will explain how algorithms make decisions, as well as providing access to procedures for appealing automated decisions, is expected. Expanding the possibilities of control over personal data and tools that will allow users to independently manage their data, delete or change information on platforms and services. With the development of encryption and new methods of anonymisation, users will receive additional tools to protect their privacy and confidentiality.
Ethical use of artificial intelligence	The introduction of ethical norms and standards will become an important aspect of the use of artificial intelligence. Ethical principles will become part of the development and implementation of algorithms to ensure fair use of data and prevent discrimination. Supervisory bodies and committees may be established to analyse new technologies and their impact on user rights, including compliance with the principles of transparency and security.
Increasing the digital literacy of the population	In the future, it is expected that digital literacy education programmes will become more accessible and reach a wider population. This will contribute to raising awareness of rights in the digital space. Dissemination of cybersecurity education resources, in particular among young people and the older generation, will help reduce the number of cases of cybercrime.

TABLE 3. Continuación

Direction of protection	Content and characteristics
Implementation of new data protection tools	New methods of encryption and pseudonymisation: These technologies will evolve and become more accessible to the general public, which will reduce the risks associated with data leakage.The introduction of blockchain technologies and decentralised systems will ensure that digital rights are preserved through transparent and secure platforms.
The growing role of civil society and activism in protecting rights	Digital activism, which is based on civil society organisations and activists strengthening their role in ensuring transparency and accountability of states and corporations, especially in the context of digital rights violations. Civil society organisations and users will be able to actively monitor the implementation of public policies related to digital rights and hold governments and corporations accountable for violations.
Stimulating innovative development in the field of rights protection	The development of research aimed at protecting digital rights will become a priority in government and corporate programmes. This will include research into cybersecurity, new data protection technologies and the ethical use of AI.
Legal regulation and laws on the protection of digital rights	Creating and enforcing specific laws, such as the EU’s General Data Protection Regulation (GDPR), that protect the rights of users in the digital environment.Expanding laws to regulate the collection, processing and storage of personal data by companies and government agencies. Giving users the ability to control access to their data and protect it from abuse.
Technological innovations for data security	Use of modern encryption technologies to ensure privacy and protect communications. Multi-factor authentication: The creation of a multi-level access system that allows for additional protection of users’ personal data. Anonymisation and pseudonymisation: The use of methods that make it impossible to identify users in common data sets, increasing the level of protection.
Transparency and accountability of algorithms	Develop algorithms that explain how decisions are made to avoid discriminatory or biased decisions. Regular independent audits to check for bias and risks to user rights. Ensure the right to appeal decisions made on the basis of algorithms or AI that affect user rights.

Compiled by the authors.

Thus, there are key opportunities for the protection of digital human and civil rights that can provide effective and sustainable protection in the modern digital environment, which provide a framework for the active protection of digital rights and allow citizens to better control their personal data and security in the digital environment (Nikitenko, Voronkova, Kaganov, 2024).

CONCLUSION

Therefore, the protection of human rights in the digital age is a complex, cross-cutting and disciplinary social issue. The academic discourse of 'digital human rights' is developing in the context of 'human rights in digital format'. Scholars use discursive materials such as 'digital humanity', 'digital rights', 'digital form' to transform digital resources into constituent elements of human rights. We have concluded that 'digital attributes of people should be the result of the extension of social attributes of people'. 'Digital rights' are still a controversial issue that lawyers, philosophers, and economists should work on. The prospects for the protection of digital human and civil rights are of profound importance in the context of growing digitalisation. Modern technological developments provide new opportunities for strengthening the protection of users' rights in the digital space, but at the same time require constant improvement of approaches and tools.

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Rehabilitación social y resocialización de los privados de libertad en Ucrania*

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Resumen. Este artículo científico está dedicado a las características de la rehabilitación social y la resocialización de las personas excarceladas en Ucrania. El logro del objetivo de la investigación fue facilitado por el uso de métodos filosóficos (dialéctico, hermenéutico, axiológico), científico general (terminológico, sistemático, modelado) y jurídico especial (legal-formal, jurídico-comparado y sociológico-jurídico). Los autores también utilizaron un método estadístico, un método de encuesta y un método de observación para confirmar las tesis y conclusiones individuales de este estudio. Se describen las siguientes etapas de resocialización del condenado: en lugares de privación

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de libertad; durante la preparación del condenado para su salida de prisión; después de salir de prisión. Sobre la base de una avanzada experiencia extranjera, se argumenta que el trabajo socioeducativo y psicológico con los reclusos debe ser complejo, individual y prácticamente dirigido al trabajo productivo, la formación, el autodesarrollo, la corrección de estados mentales negativos, etc. Se llegó a la conclusión sobre la necesidad a nivel estatal: intensificar la cooperación de las instituciones penitenciarias con los centros estatales de empleo; organizar la formación de reclusos en lugares de privación de libertad; desarrollar mecanismos para estimular a los empleadores; involucrar a los medios de comunicación en el cambio de actitud hacia los presos, etc.

Palabras clave: rehabilitación social, resocialización, sociedad, presos, lugares de cumplimiento de condena, adaptación, empleo.

Social rehabilitation and resocialization of convicts in Ukraine

Abstract. The scientific article is devoted to the features of social rehabilitation and resocialization of persons released from places of deprivation of liberty in Ukraine. The achievement of the research goal was facilitated by the use of philosophical (dialectical, hermeneutic, axiological), general scientific (terminological, systemic, modeling) and special-legal methods (formal-legal, comparative-legal and legal-sociological). Also, to confirm individual theses and conclusions of this study, the authors used the statistical method, the survey method, and the observation method. The following stages of the convict's resocialization are outlined: in places of deprivation of liberty; during the preparation of the convict for release from places of deprivation of liberty; after release from places of deprivation of liberty. Based on advanced foreign experience, arguments are given that socio-educational and psychological work with convicts should be comprehensive, individual and practically aimed at productive work, training, self-development, correction of negative mental states, etc. The conclusion was made about the need at the state level to: intensify cooperation between penitentiary institutions and state employment centers; organize training for convicts in places of deprivation of liberty; develop mechanisms to stimulate employers; involve the media in changing attitudes towards convicts, etc.

Keywords: social rehabilitation, resocialization, society, convicts, places of serving sentences, adaptation, employment.

INTRODUCTION

One of the fundamental criteria that testifies to the civilization and level of legal culture of any state is the state of observance and protection of the rights of its citizens, including convicted persons, as well as effective social adaptation and resocialization of former criminals. It is the resocialization of a person released from prison that is designed to ensure the restoration and further development of his socially useful connections, relations with society, the formation of a harmonious personality capable of objectively assessing himself and the world around him, and respecting universal and national values (Barash, 2016). Effective social rehabilitation of persons who have committed criminal offenses is one of the key aspects of these challenges.

In conditions of forced isolation from society, significant changes occur in the personality of the convict, as a result of which the values that ensure individual, extra-social existence acquire the greatest significance for him, and the values that reflect the social essence of man are relegated to the background. Therefore, social adaptation and resocialization of persons who have served their sentences in penal institutions is today an urgent and acute problem both for Ukraine and for the entire modern society, which requires substantiated scientific research and innovative approaches.

In connection with the general democratic changes and the process of humanization of global society, the specified article has a special practical significance, which determines the general positive dynamics of the activity of the entire penal system of Ukraine and foreign countries, their interpenetration and joint development.

The criminal and executive law of Ukraine is still undergoing stages of its development with the reorientation of the main emphasis from the punishment of offenders to their social adaptation and resocialization. This topic acquires particular importance in the context of European integration processes, observance of human rights in the context of international principles and borrowing advanced foreign experience for the effective regulation of these specific social relations.

The purpose of the article is a comprehensive analysis of the problems of social adaptation and resocialization of convicts, which involves solving the following tasks: clarifying the essence and content of resocialization; analyzing problems related to the resocialization and social adaptation of persons released from places of deprivation of liberty; clarifying the possibilities of implementing and supporting various processes of life of convicts in society; outlining the prospects for social adaptation and resocialization of convicts in Ukraine, taking into account effective international practices.

MATERIALS AND METHODS

This study used a comprehensive and structured approach to analyze the features of social rehabilitation and resocialization of persons released from prisons in Ukraine. The methods included a detailed review of the world scientific literature on the researched issues and regulatory legal acts of Ukraine, comparative analysis, analysis of survey data and their extended statistical processing.

Selection of bibliographic material on the topic

A search was carried out in databases of articles related to: the essence and content of resocialization (VK), foreign experience of resocialization and social adaptation of convicts (MK), prospects for social adaptation and resocialization of convicts in Ukraine (AD and IK). The search for bibliographic material was carried out in the electronic databases Google Academic, Dialnet Plus, Social Science Research Network, Scopus, Web of Science, Directory of Open Access Journals. The vast majority of the scientific works used, except for some conceptual ones, date back to the 21st century; a significant part of them are scientific articles published after 2020. For this purpose, the following keywords were used: “penalty places”, “law-abiding behavior”, “resocialization”, “social adaptation”, “social and educational work”, “employment”.

Consultations on laws regulating this issue

The process of selecting regulatory legal acts of Ukraine that regulate the application of social rehabilitation and resocialization programs for persons released from places of deprivation of liberty

was carried out independently by two authors (AD and IK). In controversial cases, the author (OK) was involved in their analysis, interpretation and compliance with modern trends in the field under study. As a result, the selected regulatory legal documents were analyzed and summarized.

Survey preparation

To conduct a (VK) survey of 65 employees of penal institutions (social and psychological service), in particular 5 correctional colonies (minimum security level with general conditions of detention – 2; medium security level – 2; maximum security level – 1), the following open questions were proposed:

- 1) Taking into account what features of the offender is the key to the effectiveness of resocialization and social adaptation?
- 2) How many convicts attended vocational training classes, received primary or secondary education in places of deprivation of liberty, had the opportunity to attend sports and cultural events?
- 3) Name the main means of promoting resocialization and social adaptation of convicts.
- 4) Indicate the key elements of the mechanism of supervised probation.

The survey data of persons (obtained by MK) released from places of imprisonment for committing mercenary, domestic, sexual and other general criminal crimes made it possible to clarify the motivational factors of resocialization and social adaptation.

Ethical considerations

Ethical approval of the study was obtained from the Audit Board of the State Penitentiary Service of Ukraine. Respondents were informed about the purpose of the study, their rights and confidentiality of the data. Measures were taken to ensure the anonymity and confidentiality of participants throughout the entire research process.

Characteristics of foreign casuistry

The arguments of individual ideas and conclusions that form the basis of the international experience of resocialization and social adaptation of convicts are based on the theoretical developments of leading European and Latin American scientists. Given the impossibility of conducting our own empirical research on foreign experience in this area, the relevant statements are mainly descriptive in nature, not key and categorical.

DISCUSSION OF CONCLUSIONS

The final analysis of all critical judgments, intermediate conclusions, and empirical data results was carried out with the participation of the entire team of authors under the leadership of the OK. At the same time, the categorical conclusions, which mainly concern the resocialization of convicts in Ukraine, are based on the coincidence of the scientific positions of all authors of this study, which are confirmed by the survey results.

Analysis of recent research

The above-mentioned issues are of great importance for ensuring a balance between punishment and rehabilitation of individuals in society. Convicts become the object of attention of scientists, lawyers, sociologists and psychologists due to the need to develop effective approaches to their social rehabilitation (Bocheliuk, 2023).

Various aspects of the problem of resocialization of convicts are the subject of research in a number of works by Ukrainian sociologists, criminologists, psychologists, representatives of other fields and sciences. These include, in particular, V. Borisov, V. Batyrgareeva, V. Golina, O. Dzhuzha, E. Moiseyev, V. Nalyvayko, O. Nezhyvets, V. Panasevich, I. Yakovets.

Scientific works by foreign scientists are devoted to certain issues related to the above-mentioned issues. Among the main ones, it is worth mentioning studies related to the emphasis on the disciplinary impact on convicts (Lei, 1984; Bastos, 1997; Laville & Dionne, 1999; Ribeiro & Cruz, 2002; Lima, 2007; Costa & Bratkowski, 2007; Goulart, 2009), the economic and social consequences of prisoner labor (Browne, 2007; Zatz, 2008; Goldberg & Linda, 2009; Fletcher, 2011; Lebaron, 2012). It should be noted that the relevant studies do not fully cover therapeutic and resocialization factors. The process of social rehabilitation and resocialization of persons released from prison, in our opinion, should be based not so much on the eradication of negative character traits of a former convict, but on the formation of positive qualities in him.

Among scientific works at the international level, we consider those works that are based on individual and social aspects of resocialization and social adaptation and, directly or indirectly, relate to the issues of motivation, reward, social duty, material satisfaction, reward, and improving the quality of life to be worthy of special attention (Isaksen, 2000; Coutinho, 2009; Rosso et al., 2010; Andrade et al., 2012; Rodrigues & Barrichello, 2015; Ortega Monge, 2019; Palacin Guido & Álvarez, 2023).

Paying tribute to the scientific works of the above and other scientists, we note that at the current stage of scientific development, the issue of resocialization and social adaptation of convicts, certain aspects of the attitude of the state to society and its influence on the resocialization process requires additional study in terms of studying world experience in this area and determining the prospects for its application in Ukraine and other developing countries.

RESULTS AND DISCUSSION

The essence and content of resocialization

Resocialization belongs to the social concepts used in almost all social sciences. It is directly related to the category of “socialization”, as evidenced by a detailed analysis and grammatical interpretation of the above concepts. Taking into account the prefix “re-” makes it possible to define resocialization as “restoration or repetition of an action”, “counteraction” to the asocial degradation of the individual”.

In Part 2 of Article 6 of the Criminal Code of Ukraine, the concept of “resocialization” is defined as “the conscious restoration of a convict in the social status of a full member of society; his return to an independent, generally accepted socio-normative life in society”. The Law calls the correction of the convict a necessary condition for resocialization. Means of correction and resocial-

ization of convicts are applied taking into account the type of punishment, the personality of the criminal, the nature, degree of social danger and motives of the committed criminal offense and the behavior of the convict while serving the sentence (Criminal and Executive Code of Ukraine, 2003).

At the same time, given this legal formulation, many questions regarding its content and essence remain unclear, in particular regarding the level of imperativeness of resocialization: is it a right or an obligation for the convict; whether the state must necessarily take measures for the resocialization of certain categories of persons; whether resocialization is an integral part of the process of serving the sentence. It is quite natural that due to such legislative lack of specificity, a single comprehensive vision of the criminal-legal content of resocialization has not yet been formed among scientists.

In particular, V. Synyov and V. Kryvusha calls the process of resocialization a single process of restoring and developing socially useful connections and relationships, both during the period of serving a sentence and after release, and the further adaptation of the convict to independent life in freedom (Synyov & Kryvusha, 2000). L. Zhuk and O. Nezhyvets interpret resocialization as a complex socio-legal category that covers various aspects of renewing social ties both in penal institutions and after release from places of deprivation of liberty, when a person undergoes social adaptation, solves housing problems, gets a job, needs medical and psychological assistance, financial and state support (Zhuk & Nezhyvets, 2013). O. Tsarkova defined it as the re-acquisition of the culture of human relations, the acceptance of certain social norms, roles and functions, the acquisition of skills and abilities necessary for their successful implementation (Tsarkova, 2012). E. Barash emphasizes that this is a long-term process, the basis of which is a complex set of psychological, pedagogical, economic, medical, legal and organizational measures aimed at forming in each convict the ability and readiness to be included in the normal conditions of life of society after serving his sentence (Barash, 2016).

Resocialization refers to the process of resocializing, re-engineering, or readapting an individual to adhere to a new set of appropriate attitudes, values, and behaviors in society. Often occurring in total institutions, resocialization involves the deconstruction and rebuilding of an individual's identity (or identities) (Carter & Naseif, 2020).

Taking into account the above definitions, the resocialization of persons released from places of deprivation of liberty is a complex process of restoring, preserving and developing socially useful connections and relationships of the convict during the period of serving his sentence and at the first stage of his life after release. In the criminal law context, resocialization should be considered a multi-stage and long-term process of returning the convict to a generally accepted way of life in society with the restoration and / or establishment of lost socially useful connections and relationships, legal status, existing during, after and during a certain initial period after serving the sentence.

Some scientists have made proposals for amendments to the criminal law of Ukraine in terms of defining the concept and essence of resocialization, indicating the degree of state participation in the process of resocialization, as well as the features of its implementation at different stages - during the entire period of serving the sentence, immediately after its serving, as well as at the initial stage of the convict's return to society (Barash, 2016). In our opinion, the introduction of relevant amendments to the legislation is not capable of significantly improving the state of affairs in the specified area. In this case, a comprehensive nationwide approach to resolving issues of socio-educational and rehabilitation impact on convicts is needed.

It has been repeatedly noted in the special literature that the process of returning to law-abiding life is quite complicated. Isolation from society, especially for long periods, causes the loss of socially useful connections, deprives independence in solving most everyday issues. While in places of deprivation of liberty, a person often acquires new skills of criminal life for him. In addition, during the serving of the sentence, individual existing personality deformations may deepen, which significantly complicates the resocialization and social adaptation of convicts. 45% of the surveyed employees of penitentiary institutions also indicated the deepening of individual personality deformations.

The above emphasizes the importance of effective social adaptation and resocialization of those persons who have been sentenced to real terms of imprisonment or those who have just been released after serving them.

During the execution of sentences, the state, represented by authorized bodies, must simultaneously provide assistance to persons released from places of deprivation of liberty in choosing a socially useful or socially acceptable direction of life in order to prevent the recurrence of criminal acts. Therefore, an important role in the process of resocialization is played by properly organized preventive work among convicted persons - both at the stage of serving their sentence and immediately after their release from places of deprivation of liberty. Prevention in this context should be considered a set of measures aimed at timely identification and elimination of negative factors that have arisen or may potentially arise and cause the repeated commission of intentional crimes by persons sentenced to long terms of imprisonment.

This is an individual level of crime prevention, since other levels - general and special-criminological - have a completely different content, purpose and sphere of influence. The individual level of crime prevention involves a targeted impact on a certain circle of persons if the following grounds are present: the real behavior of a person, in which a potentially socially dangerous act is hidden (the main focus of such a person is antisocial behavior); the presence of a certain level of quantitative and qualitative indicators, which indicates a high degree of criminogenicity of a person and allows him to be distinguished from those from whom it is more likely that a crime will be committed in the near future (Barash, 2016).

From the analysis of scientific literature, legislative sources and penitentiary practice, we can conclude that individual prevention is a set of measures such as: the process of explaining the need for convicts to adhere to the normatively established lifestyle in society (individual conversations, collective conversations in small groups, lectures on legal topics, their further discussion, etc.); organization of measures to ensure a positive direction in the lives of persons who have committed crimes and served their sentences (organization of meetings with former convicts, who, with their example of successful resocialization, can form the appropriate motivation for the relevant target audience); creation of conditions for the normal development of the personality of a former convict (in particular, obtaining at least the minimum necessary level of education to stimulate participation in public and cultural life, further effective employment); social protection of previously convicted persons (assistance in employment, improvement of living conditions, establishment of useful connections with public charitable organizations, provision of free medical care, etc.).

Resocialization is a social concept that means “renewal or repetition of actions that counteract the social degradation of the individual”. In the system of means of correction and resocialization of convicted persons regulated by the penal legislation of Ukraine, an important place belongs to

social and educational work. Such work is aimed at forming and consolidating in convicted persons the desire to engage in socially useful activities, a conscientious attitude to work, compliance with the requirements of laws and other rules of conduct accepted in society, and raising their general educational and cultural levels. Therefore, in our opinion and the conviction of 88% of the surveyed employees of penitentiary institutions, it is important to take into account the features of resocialization when planning social and educational work.

We consider the position of O. Nezhyvets, which identifies the following main stages of resocialization of convicts: passing a guilty verdict and imposing a sentence on the convict; adaptation of the convict to the conditions of serving the sentence; correction; preparation of the convict for release from places of deprivation of liberty; social adaptation to the conditions of life in freedom” (Nezhyvets, 2005). It is better to talk about the periods of the penitentiary cycle of the convict’s life, during each of which such persons are forced to adapt to new living conditions: during the first three periods – to go through “desocialization”, and only after that (during the fourth and fifth periods) to get the opportunity for resocialization. As noted by O. Melnychenko and S. Dypko, there is a pattern: the more destructive the desocialization was, the more difficult the resocialization will be (Melnychenko & Dypko, 2011).

Conducting an analysis of the socio-legal nature of resocialization in accordance with the statements of scientists and practitioners who have studied the legal, pedagogical and social aspects of this process, in our opinion, the following classification of the stages of resocialization of a convict would be more accurate: resocialization in places of deprivation of liberty; resocialization during the preparation of a convict for release from a penal institution; resocialization after release from places of deprivation of liberty.

One of the means of correction and resocialization of convicts is social and educational work, however, the Criminal Code of Ukraine defines this means only for convicts sentenced to imprisonment. But in this case, the specified means is effective for convicts serving sentences not related to imprisonment, since social and educational work in relation to this category of convicts can be carried out in various forms: moral and legal education by conducting certain lectures, conversations, which will contribute to the further gradual adaptation of such convicts.

A.V. Skits indicates that the issue of determining the tasks of social and educational work becomes particularly relevant due to the fact that the concept of “social and educational work” is complex and combines two areas – educational and social work, which, of course, have their own significant features and differences (Skits, 2011).

Instead, L. Zavatska claims that social and educational work consists of the following components: educational work as a system of pedagogically justified measures aimed at correcting the behavior of convicts in order to achieve positive intellectual, spiritual and physical changes in their personality and eliminate personal deformations; social work as a specific type of complex activity to provide social assistance, aimed at ensuring a person’s comprehensive life activity, recreating a full-fledged human personality, forming and preserving useful skills, and restoring and developing social ties; psychological work as the professional activity of psychologists to provide convicts with psychological assistance in preventing psychotraumatic effects on the personality, developing and implementing, together with the staff of penal institutions, individual programs of psychocorrectional and pedagogical influence on convicts (Zavatska, 2008).

In our opinion and in the opinion of 85% of the surveyed employees of penitentiary institutions, the key to the effectiveness of resocialization and social adaptation is taking into account the criminological characteristics of the criminal's personality. It is necessary to differentiate work with different categories of convicts, in particular, to take into account their age, psychological and socio-biological characteristics.

International experience of resocialization and social adaptation of convicted persons

In the context of the problem under study, the experience of social adaptation and resocialization in Latin American countries deserves attention. In short, resocialization in Chilean legislation fosters respect for criminal law, a break from criminal behavior, and inmate awareness and responsibility through prison treatment. However, the reality of Chilean prisons goes beyond the aspirations of the law. The implementation of resocialization programs in these prisons is incipient, representing a challenge to the social order and the legal status of their residents, who, year after year, show increasing signs of vulnerability.

The main factor behind this is prison overcrowding, a widespread phenomenon that prevents effective security in prisons and sufficient access to basic services (Verdejo Verdejo, 2023). The Chilean prison system faces complex challenges, evidenced by a steady increase in violations of fundamental rights and precarious living conditions in prison facilities. This ultimately contributes to the failure of rehabilitation efforts, which in turn is reflected in higher rates of criminal recidivism (Sanhueza Olivares & Pérez, 2018).

As Macana Gutiérrez and Tamayo Arboleda (2023) rightly point out, effective social adaptation is unlikely in Colombia due to the wretchedness of prisons, which force the prisoner to endure, resist, or die. The prisoner must create a unique mode of resistance, find some meaning for prison suffering, a unique way of studying, working, having fun, accessing opportunities and services, among other things.

In the Argentine legal system, the main purpose of prison confinement is the proper resocialization of the inmate, but it also pursues other goals, such as having a deterrent and retributive effect (Arocena, 2024). In the Argentine resocialization process, the positive reception of the inmate is emphasized. The individual must ask themselves about their life, about "what they want to do with it; what they can do; what tools they have, from confinement, so that when they are released, they can lead a life without committing crimes" (Palacin Guido & Álvarez, 2024).

Resocialization in the Peruvian legal system, despite being regulated at the constitutional, legal and sub-legal levels and recognized as an objective of the penitentiary regime and punishment, demonstrates undeniable shortcomings that are far from practical results. On the other hand, the Constitutional Court, the highest interpreter of the political constitution of Peru, has received broad support on all issues of resocialization. It has even linked it to the protection of human dignity in a constitutional and social state of law. However, the Peruvian prison reality shows that these rules and protections judicial practice usually do not translate into effective guarantees of protection (Vasquez, 2024).

We also consider it advisable to refer to the positive experience of European countries on issues of social adaptation and resocialization of convicts.

Resocialization, in general, means work first of all. "Occupational therapy" in Germany is not forced labor without the right to choose, but part of rehabilitation. Prisons in Germany have a nar-

row specialization in issues of labor rehabilitation of convicts. Usually, German convicts work for specific private firms that have concluded a contract with them, receive a working profession and an appropriate salary.

At the same time, the resocialization of German prisoners is not limited to the confines of penitentiary institutions. German legal practice demonstrates that this process is constantly in flux and depends on social impulses. In recent years, such an impulse has been the activation of the institute of volunteer mentors, who are often involved in working with minors and young prisoners. Mentors are usually middle-aged and older people who are respected in society and realize the importance of this type of activity. A special form of volunteer work in German penitentiary institutions is the activity of prison councils (Gefängnisbeiräte). The councils have certain control functions and can consider prisoners' complaints within the framework of public supervision.

In this case, special attention is paid to increasing the motivation of prisoners to achieve the necessary level of resocialization. Taking into account this aspect, the term "aktivierender Strafvollzug" (activating system of execution of punishment) often used in the German correctional system becomes quite understandable, in which the word "activating" carries an important semantic load, that is, a complex activity that encourages active actions and is aimed at returning a person to society. One of the most effective areas within the framework of this activity is penitentiary socio-therapeutic work, to which German specialists include: phased integration of prisoners into society with the simultaneous settlement of financial, family or other conflicts, obtaining or completing secondary education, developing skills and abilities for professional activity, etc.; measures aimed at counteracting the negative consequences of being in prison, such as the breakdown of relations with loved ones and relatives, loss of a job or place of study; conducting trainings aimed at suppressing aggressiveness, negative emotions, fear; application of appropriate psychotherapeutic measures (Brühwiler, 2021).

Also, the social services of German correctional institutions attach great importance to establishing active interaction with public organizations. Authoritative people of the city (doctors, teachers) are members of the board of trustees, independent of the prison administration, which has the right of access to all spheres of life in the prison. The main task of the board of trustees of a correctional institution is to approximate the situation in prison to life in freedom.

The experience of the United Kingdom in implementing measures for the social adaptation and resocialization of convicts is noteworthy. Such a system provides for an extensive system of control over this process, which ensures coordination, a high level of transparency and openness. The corresponding measures are of a comprehensive nature and are actively implemented by other branches of government, in addition to the executive; a separate and quite significant role in monitoring the implementation of the specified policy is assigned to public organizations (Muravyov, 2017).

According to Article 2, Chapter 1 of the Imprisonment Act of Finland, the purpose of serving a sentence in the form of deprivation of liberty is to increase the prisoner's readiness for a life without crime by promoting the prisoner's ability to manage his or her life and facilitating his or her reintegration into society, as well as preventing the commission of crimes while serving the sentence (Imprisonment Act 767/2005). It is obvious that it is precisely resocialization and reintegration into society that is successfully achieved in this country, where the conditions in prisons actively contribute to this. In particular, each convict has his or her own "future advisor" who prepares an individual rehabilitation plan, which includes training or work, treatment, psychological and spiritual cor-

rection. More than half of prisoners attend vocational training classes; approximately 20% receive primary or secondary education in places of deprivation of liberty. They are provided with access to libraries and mass media. In open-type prisons, convicts are allowed to visit swimming pools, sports and cultural events. About 40% of prisoners are provided with daily wage work. Traditional prison industries are woodworking, metalworking and agriculture.

In closed prisons, prisoners do not work for hire, but are involved in work for educational purposes, receiving financial assistance for this. Prisons organize versatile education in cooperation with educational institutions. Prisoners are offered vocational, orientation, general education, university and polytechnic education, available in the form of distance learning. Education outside the prison with a study permit is usually possible in open prisons (Information on the enforcement of sentences in Finland, 2018).

The main tool for resocialization in French correctional institutions is to ensure that prisoners receive vocational education with the aim of their further employment (Sleptsov, 2009). Schooling is mandatory up to the age of 16. Every year, up to 28,000 prisoners undergo training courses, of which 800 or more people receive full-time higher education in various higher education institutions in the country; in addition, up to 3,000 people study in absentia (World Prison Brief, 2022). In Norway, 20% of prisoners study under the program of higher education institutions. In particular, lectures and various forms of independent work are provided, which guarantees full employment of prisoners. In Switzerland, in order to increase the chances of a convict on the labor market after release, small production enterprises are created in correctional institutions, which are partially exempt from taxes. The resocialization stage in many countries is provided by the probation service, which can implement one of two models: prosocial, when the employee mainly performs the function of a social worker, interacts with the convict's family, the convict himself (Germany, France, the Netherlands); supervision, in which an employee monitors the released (conditionally convicted) and ensures that the supervised person behaves in accordance with the conditions of release (sentence) (Great Britain, USA) (Romanov & Zhuvak, 2021).

The information presented in this section allows us to summarize that in penitentiary systems around the world, the main means of promoting the resocialization and social adaptation of convicts are considered to be general and vocational training, psychological support programs, as well as productive work. At the same time, in most countries, the emphasis is on social work with convicts, who should return to society without problems and not be a burden to their relatives, community, and state. It is precisely such problems that persons released from prisons in Ukraine often face: 37% felt that they were a burden to the community, the state; 26% had difficulties in relationships with relatives and loved ones.

Prospects for social adaptation and resocialization of convicts in Ukraine

Currently, in Ukraine, the process of social adaptation and resocialization of released persons is very difficult, since this process requires financial support from the state, but the envisaged measures do not always have time to change in accordance with the needs of society. The implementation of this concept is also complicated by the fact that Ukraine is in a state of war.

It should be noted that in Ukraine, the legal regulation of the application of social rehabilitation programs is at the stage of its formation. In accordance with clause 5, paragraph 4 of the Penitentiary System Reform Strategy for the period until 2026, in the coming years it is planned

to improve the methods and tools of social rehabilitation of convicts (Penitentiary System Reform Strategy for the period until 2026). The document indicates that one of the tasks for the implementation of this strategic goal is to introduce criminogenic risk assessment and individual planning in the activities of bodies and institutions for the execution of sentences; development and implementation of correctional programs, including taking into account the dependencies of convicts; improvement of the system of psychological assistance to convicts and persons taken into custody (Order of the Cabinet of Ministers of Ukraine No. 1153-r, 2022).

In addition to general correctional programs, an individual program of social and educational work is drawn up for each convict. Thus, in accordance with Art. 95 of the Criminal Executive Code of Ukraine, based on the results of a medical examination, primary psychodiagnostics and psychological and pedagogical study and on the basis of criminological, criminal and legal characteristics, an individual program of social and educational work is drawn up for each convict, which is approved by the head of the colony. A special individual program is drawn up for each convict, which provides for measures of an individual educational, psychotherapeutic, psychocorrectional nature (Part 3 of Art. 97) (Criminal Executive Code, 2023).

Such programs include typical programs of differentiated educational influence. In accordance with the order of the Ministry of Justice of Ukraine dated 16.05.2016 No. 1418/5 "On approval of the provisions on programs of differentiated educational influence on convicts", 11 such programs are used in Ukraine (Order of the Ministry of Justice of Ukraine No. 1418/5, 2016). The implementation of the program provisions is carried out on the basis of the department of the social and psychological service within the framework of social and educational work in accordance with Art. Art. 123, 124 of the Criminal Enforcement Code of Ukraine.

In general, programs of differentiated educational influence are divided by their focus into general educational and correctional. Programs of general educational influence cover the topics of education (including vocational (vocational and technical)), legal education, spiritual revival, creativity, physical education and sports, preparation for release, etc. Instead, the purpose of implementing correctional programs is to minimize the criminogenic needs of convicts identified on the basis of an assessment of the risk of committing a repeated criminal offense, correct negative behavioral manifestations and form in convicts the skills necessary for successful resocialization, prevent them from committing repeated criminal offenses, as well as prepare them for an independent, generally accepted socio-normative life in society (Order of the Ministry of Justice of Ukraine No. 1418/5, 2016).

Also, in accordance with clauses 1-2 of 2 of the Order of the Ministry of Justice of Ukraine dated January 29, 2019 No. 272/5 "On Approval of the Procedure for Supervision and Conducting Social and Educational Work with Convicted Persons to Punishments Not Related to Deprivation of Liberty" during supervision and conducting social and educational work, the probation authority: conducts preventive and educational conversations with the convicted person, draws up an individual work plan with convicted persons taking into account risk assessment; applies a differentiated approach when providing advisory, psychological and other types of assistance to convicted persons; promotes employment, involvement in training, participation in educational activities and socially useful activities of convicted persons (Order No. 272/5, 2019).

An important element of the mechanism of supervised probation is the application of a set of measures for the implementation of probation programs (Korenyuk, 2018), the importance of

which was indicated by 74% of the surveyed employees of penal institutions. In order to implement this direction, Ukraine cooperates with the mission of advisors in the field of security and law of Norway. The NORLAU project has been launched, the purpose of which is to create a full-scale probation system in Ukraine, develop and test standard programs based on the positive experience of countries such as Latvia, Lithuania, Sweden, etc. (Chernyshov, 2019; Bocheliuk, 2023).

Ukraine has also begun to use the unique Scandinavian experience of involving a wide range of people in the discussion of correctional policy. The concept of a “full member of society” implies the ability of a person to enjoy all human and civil rights and bear appropriate responsibilities. One of the most important issues is the realization by those released from places of deprivation of liberty of their constitutional right to work, which is considered one of the main ones in the implementation of social rehabilitation programs. In this context, we consider the experience of countries such as Germany, Norway, Finland, and the United Kingdom, highlighted above, to be positive.

At the legislative level, the state establishes guarantees of assistance to persons released from prison in their employment. In particular, the Law of Ukraine “On Employment of the Population” includes persons released after serving a sentence or compulsory treatment as categories of citizens who have additional guarantees in promoting employment. The law specified that liability arises for an unjustified refusal to employ such persons in the amount of twice the minimum wage established at the time the violation was detected (Law of Ukraine “On Employment of the Population”, 2013). At the same time, the legislation does not provide for the employer’s liability for failure to provide employment to the specified category of citizens through a quota, and, as before, establishes liability only for the refusal to employ citizens who have additional guarantees in promoting employment.

In our opinion, a mechanism should be developed to compensate employers who can employ “former prisoners” for the costs of paying the labor of this category of citizens in proportion to the time worked, which is recorded in the monthly working time sheet, but not more than the norm established by the legislation of Ukraine. Therefore, measures should be established at the legislative level to encourage employers to employ this category of persons.

In this context, it is important to clarify the desire of convicted persons and former prisoners to assimilate into society, to be useful to society and to have the opportunity to coexist with other members of it with dignity.

According to the survey, the vast majority (92%) of persons who committed criminal offenses for profit understand and are aware of the social danger of such an act; among them, 66% expressed their readiness for community service. In contrast, persons who committed domestic crimes, crimes against life, health and sexual freedom and inviolability, etc., often (43%) did not admit their guilt and were mostly not motivated to do community service (57%) even when work activity provided an opportunity to be released from prison early.

In Ukraine, as in many Latin American countries, the regulatory and legal regulation of the process of social adaptation and resocialization of convicts is at the stage of its formation. One of the main problems for these countries, as well as for other developing countries, is the lack of a comprehensive approach to the rehabilitation of convicts, which does not take into account the individual needs, characteristics of convicts, as well as the criminal offenses they commit.

Despite the fairly active use of correctional, probation programs, programs of general educational and differentiated educational influence, their effectiveness in Ukraine remains insufficient.

A significant number of convicts cannot receive the necessary set of measures that would take into account their individual needs and characteristics.

The example of countries with a developed system of penal policy has proven that social, educational and psychological work with convicts should be comprehensive and have a real practical focus on productive work (with the possibility of conditional early release from places of deprivation of liberty), training, self-development, correction of negative mental states of the convict, etc. The state must ensure the development of social institutions, the basis of whose activities will be assistance in the resocialization of those released from places of deprivation of liberty. In penal institutions, all conditions must be created for conducting educational work and for convicts to gain real experience of socially approved behavior.

CONCLUSION

Based on the results of the analysis of the problems studied in the scientific article, we can draw the following conclusions.

In modern society, where the role of law and order is recognized as key to ensuring harmonious functioning, the process of correction and resocialization of convicts is of extremely important importance. Society must build not only a responsible and fair criminal justice system, but also provide opportunities for individuals to return to self-directed law-abiding behavior.

Resocialization of convicted persons is a complex process of restoring, preserving and developing socially useful connections and relationships of a convicted person during the period of serving his sentence and at the first stage of his life after release. This is a multi-stage and long-term process of returning a convicted person to a generally accepted way of life in society with the restoration and / or establishment of lost socially useful connections and relationships, legal status, existing during, after and during a certain initial period after serving his sentence. The stages of resocialization of a convicted person include: resocialization in places of deprivation of liberty; resocialization during the preparation of a convicted person for release from a penal institution; resocialization after release from places of deprivation of liberty.

The implementation of measures for the social adaptation and resocialization of convicts requires compliance with international standards for the treatment of convicts and those released from places of deprivation of liberty, as well as possession of knowledge and practical skills in such areas and branches as criminology, pedagogy, psychology, in particular penitentiary, criminal and penal law, social and educational work.

From the analysis of penal principles of social adaptation and resocialization of convicts in a number of foreign countries, it is seen that in such countries as Germany, the USA, Great Britain, Norway, Finland, France, the main means of promoting the resocialization of criminals are considered to be industrial labor, general educational and vocational training, and psychological support programs. In particular, the practice of involving the public, employers, and religious organizations in the process of rehabilitation of convicts is inherent in Germany and Great Britain. In Norway and Finland, the emphasis is on the principles of humanity, respect for human dignity and minimizing the isolation of convicts from society.

Based on the experience of such countries as Switzerland, Norway, Sweden and the Netherlands, it has been established that social adaptation and resocialization of convicts serving sentences

not related to deprivation of liberty can be carried out separately from correction, since the effectiveness of the result of this process is possible only with a mutual combination of these categories. The list of means of correction and resocialization for such persons has certain features related to the specifics of serving sentences, which should be taken into account when enshrining them in regulatory legal acts.

In Ukraine, as in some countries of Latin America, the regulatory and legal regulation of the process of social adaptation and resocialization of convicts is at the stage of its formation and is characterized by the lack of a comprehensive approach to the rehabilitation of convicts, and correctional and probation programs are limited to education or professional training, without taking into account the individual needs and characteristics of each convict. The methods reflected in the relevant correctional programs should cover all needs that arise in the process of resocialization and social rehabilitation of convicts, be sufficiently specific and take into account the individual characteristics and needs of certain categories of persons. Ensuring an individual approach to each convict will contribute to reducing the level of recidivism and ensuring effective work on the social rehabilitation of convicts.

Having analyzed the penal-executive principles of social adaptation and resocialization of convicts in a number of foreign countries, we came to the conclusion that in Ukraine and other developing countries, a set of measures should be taken at the state level, in particular: intensification of cooperation between penal institutions and state employment centers in terms of determining demand on the labor market; organization of training of convicts taking into account their skills and abilities on the basis of penal institutions; mechanisms for stimulating employers to hire persons who have been released from places of imprisonment should be developed and established; by state order, active work should be carried out by the mass media to change attitudes towards persons released from places of imprisonment, to prove that these people have already been punished by the state for what they have committed and society should help them return to a full-fledged, generally acceptable life in society.

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INTERACCIÓN Y PERSPECTIVA

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ARTÍCULO DE INVESTIGACIÓN

Discursos e ideas que sirvieron de sustento al Estado de derecho. Una mirada desde la historia de las ideas políticas en la Ucrania de los siglos XIX y XX

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Resumen. Por lo general, la historia de Ucrania desde el siglo XIX hasta la actualidad está marcada por profundas transformaciones. En este contexto, el objetivo general de esta investigación es reinterpretar críticamente los discursos e ideas que sirvieron como base para el Estado de derecho en Ucrania durante los siglos XIX y XX. Para el logro de este objetivo se hace uso del método histórico, bajo el enfoque de la historia de las ideas y de la hermenéutica para entender los textos y sus contextos a través del tiempo. Los resultados permiten concluir que, los discursos e ideas sobre el Estado de derecho en Ucrania han evolucionado desde nociones federalistas y consuetudinarias en el siglo XIX, hasta convertirse en un elemento central del proyecto nacional contemporáneo. Aunque marcados por tensiones históricas y desafíos externos e internos, estos discursos han sido fundamentales para articular las aspiraciones democráticas y soberanas de Ucrania. Desde su lucha contra la dominación imperial hasta su resistencia frente a agresiones externas en el siglo XXI, el Estado de derecho ha sido tanto un objetivo como un medio para afirmar la identidad nacional ucraniana, de ahí que su significado trascienda por mucho a la narrativa jurídica.

Palabras clave: discursos e ideas; historia de Ucrania; Estado de derecho; siglos XIX y XX; historia de las ideas políticas.

Discourses and ideas that underpinned the rule of law. A look from the history of political ideas in Ukraine in the 19th and 20th centuries

Abstract. In general, the history of Ukraine from the 19th century to the present is marked by profound transformations. In this context, the overall objective of this research is to critically reinterpret the discourses and ideas that served as the basis for the rule of law in Ukraine during the 19th and 20th centuries. For the achievement of this objective, use is made of the historical method under the approach of the history of ideas and hermeneutics to understand the texts and their contexts through time. The results allow us to conclude that, discourses and ideas about the rule of law in Ukraine have evolved from federalist and customary notions in the 19th century, to become a central element of the contemporary national project. Although marked by historical tensions and external and internal challenges, these discourses have been instrumental in articulating Ukraine's democratic and sovereign aspirations. From its struggle against imperial domination to its resistance in the face of external aggression in the twenty-first century, the rule of law has been both a goal and a means of asserting Ukrainian national identity, hence its significance far transcends the legal narrative.

Keywords: discourses and ideas; history of Ukraine; rule of law; 19th and 20th centuries; history of political ideas.

INTRODUCCIÓN

En palabras de Danilyan, et al (2022), la historia de las ideas políticas ofrece una herramienta cognitiva invaluable para comprender los discursos que sustentaron la configuración del Estado de derecho en Ucrania durante los siglos XIX y XX. Este enfoque teórico y metodológico permite analizar cómo las ideas sobre justicia, libertad y soberanía se entrelazaron con las transformaciones sociales, culturales y políticas de la región. En el caso específico de Ucrania, un país marcado por su posición geopolítica entre imperios y su lucha constante por la autodeterminación, los discursos políticos no solo reflejaron aspiraciones democráticas, sino también, tensiones estructurales inherentes entre tradiciones locales y modelos externos de gobernanza.

Todo indica que, el proceso de construcción del Estado de derecho en Ucrania fue dialéctico, lleno de contradicciones objetivas y subjetivas. Por un lado, las ideas de derecho natural y las costumbres desempeñaron un papel central en la preservación de la identidad jurídica ucraniana frente a la dominación imperial zarista. Por otro lado, tal como sostiene Tsvigun (2024), las influencias externas, como el derecho romano-germánico y los ideales europeos de democracia, entre otras, se integraron a través de procesos complejos que a menudo generaron conflictos internos. Este contexto histórico evidencia cómo los discursos legales y políticos evolucionaron en una interacción constante entre tradición e innovación, hasta el día de hoy.

El objetivo general de este análisis es reinterpretar críticamente los discursos e ideas que sirvieron como base para el Estado de derecho en Ucrania durante los siglos XIX y XX. Desde esta perspectiva, surgen tres preguntas clave: ¿Cómo influyeron las tradiciones locales y las ideas externas en la configuración del marco jurídico ucraniano? ¿De qué manera los discursos políti-

cos reflejaron las tensiones entre identidad nacional y modernización? Y ¿Qué papel jugaron los actores intelectuales y políticos en la articulación de estas ideas dentro del contexto histórico más amplio en Europa del este?

Por lo general, la historia de Ucrania desde el siglo XIX hasta la actualidad está marcada por profundas transformaciones materiales y simbólicas. Durante el dominio imperial (zarista, austro-húngaro y otomano), Ucrania luchó por preservar su identidad cultural y jurídica mediante tradiciones como el derecho consuetudinario. En palabras de Tsvigun (2024), la Revolución Ucraniana (1917-1921) representó un intento significativo por establecer un Estado independiente, aunque fue truncado por la incorporación al régimen soviético. En este hilo de acontecimientos, bajo el dominio soviético (1922-1991), se impusieron estructuras legales colectivistas que suprimieron muchas tradiciones locales.

Tal como sostiene Mazower (2017), con la independencia en 1991 tras el colapso de la Unión Soviética, en adelante URSS, Ucrania inició un proceso de transición hacia un modelo democrático basado en principios europeos próximos al pensamiento liberal. Este periodo estuvo marcado por reformas legales orientadas a fortalecer el Estado de derecho, aunque enfrentó desafíos significativos debido a la corrupción, la inestabilidad política y los conflictos armados recientes con Rusia. A pesar de estos obstáculos, Ucrania ha buscado consolidar su soberanía jurídica mediante una combinación de herencias históricas propias y adaptaciones al programa filosófico y político de la modernidad occidental.

Este artículo se estructura en cinco partes principales. En la primera, se describen los fundamentos teóricos de la investigación. En la segunda parte, se expone la metodología empleada. En la tercera, se examinan los fundamentos históricos e intelectuales del Estado de derecho en Ucrania durante el siglo XIX, centrándose el análisis en las tradiciones jurídicas locales. En la cuarta parte, se discuten las transformaciones sufridas bajo el régimen soviético y su impacto en las ideas políticas ucranianas. Finalmente, en la quinta parte, se aborda hermenéuticamente el periodo posterior a 1991, explorando cómo los discursos contemporáneos han intentado reconciliar el pasado, lejano o cercano, con las aspiraciones democráticas actuales de una sociedad que lucha por su autonomía y por el logro de su desarrollo sostenible.

FUNDAMENTOS TEÓRICOS

Como es normal en los procesos epistemológicos, la historiografía ucraniana ha experimentado un notable desarrollo en las últimas décadas, con un enfoque creciente en la reconstrucción de las ideas políticas y jurídicas del país. En este contexto, entre las obras más destacadas por sus atributos y contribuciones se encuentra “*Constitutional and Legal History Works of Ukrainian Scholars in 2000-2015*” de Shandra (2018), la cual ofrece una visión panorámica de las investigaciones recientes en historia constitucional y legal de Ucrania. Por lo demás, este trabajo destaca la importancia de instituciones como la Asociación Internacional de Historiadores del Derecho en el fomento de estudios histórico-jurídicos y señala las principales tendencias de investigación en el país, y es que:

The historical-legal research conducted in Ukraine holds a prominent place among other research in law. Every year the interest in it is growing. The more research that is conducted, the more approaches and problems appear; since law historians, due to external or specific personal reasons, have not dedicated adequate attention to them. (Shandra, 2018, p. 68)

Otro aporte significativo es el del profesor Zabirko (2022), quien ha publicado extensamente sobre la historia del Estado y el derecho tanto de Ucrania como de otros países de Europa. Sus obras, que incluyen “Historia del Estado y el Derecho de Ucrania” y “República Nacional de Ucrania Occidental (1918-1923)”, han sido fundamentales para comprender la evolución de las instituciones jurídicas ucranianas. Sin ninguna duda, Zabirko ha prestado especial atención a períodos cruciales como la formación del Estado ucraniano moderno en el siglo XX y las influencias extranjeras en el desarrollo legal del país.

Por otro lado, y tal como explica Mazower (2017), el concepto de Estado de derecho en Ucrania ha evolucionado significativamente desde el siglo XIX. Durante el período imperial, las ideas de derecho natural y la costumbre jugaron un papel importante en la preservación de la identidad jurídica ucraniana frente a la dominación externa. No obstante, la Revolución Ucraniana de 1917-1921 marcó un intento importante de establecer un estado independiente basado en principios democráticos, aunque fue truncado por la incorporación del país a la Unión Soviética. Bajo el régimen soviético, el concepto de Estado de derecho fue reemplazado por estructuras legales colectivistas que suprimieron muchas tradiciones locales. Sin embargo, con la independencia en 1991, Ucrania inició un proceso de transición hacia un modelo democrático basado en principios europeos. Este período ha estado marcado por reformas legales orientadas a fortalecer el Estado de derecho, aunque ha enfrentado desafíos significativos debido a la corrupción y la inestabilidad política constante.

En la Ucrania contemporánea, las principales ideas y discursos políticos que han modelado la noción de Estado de derecho incluyen, como en la Europa occidental nociones de pluralidad, soberanía y la integración europea en el marco integrador de la Unión Europea, como bloque geopolítico opuesto a Rusia. Desde 1991, Ucrania ha establecido una identidad nacional basada en estos conceptos, buscando distanciarse del legado soviético y, simultáneamente, afirmar ontológicamente su independencia como Estado soberano. En este contexto, al decir de Danilyan et al., (2022), la idea de pluralidad se refleja en el reconocimiento de la diversidad étnica y lingüística del país, mientras que la soberanía se ha convertido en un principio central en el contexto de las tensiones con Rusia que desembocaron en la guerra.

Desde los acontecimientos del Euromaidán en 2013, la aspiración nacional mayoritaria a la integración europea ha sido otro factor clave en la configuración del discurso sobre el Estado de derecho en Ucrania. Según Tsvigun I. (2024), este objetivo político e ideológico ha impulsado reformas legales y administrativas orientadas a alinear el sistema jurídico ucraniano con los estándares de la Unión Europea. La obtención del estatus de candidato a la UE en 2022 ha reforzado este impulso, subrayando la necesidad estratégica de una adaptación cualitativa del sistema legal ucraniano para la superación definitiva del legado post-soviético.

METODOLOGÍA

Desde el punto de vista de los autores, el método histórico se aplica al estudio de los discursos e ideas sobre el Estado de derecho en Ucrania mediante el análisis crítico y contextualizado de los procesos históricos que moldearon estas nociones, en la relación que se da entre narrativas y contextos (Molero de Cabeza & Cabeza, 2009). Este método permite identificar las continuidades y rupturas en las ideas políticas y jurídicas desde el siglo XIX, hasta la actualidad, considerando los contextos sociopolíticos en los que emergieron. Por ejemplo, el trabajo de Trejos-Mateus y Herrera-Kit (2023),

destaca cómo la Revolución Ucraniana de 1917-1921 fue un momento clave en la articulación de principios democráticos y soberanía estatal, lo que ilustra la importancia de periodizar y analizar los eventos históricos con un enfoque crítico y dialéctico.

Para garantizar la rigurosidad académica, se trabajó con fuentes documentales de alto valor científico, incluyendo artículos de revistas indexadas, tesis doctorales, monografías y documentos oficiales en diferentes idiomas. Estas fuentes fueron interpretadas bajo los criterios hermenéuticos de la crítica interna y externa propuestos por León Halkin. Según Brom (2003), este método permite evaluar al mismo tiempo, la autenticidad, credibilidad y contexto de las fuentes históricas, asegurando una reconstrucción precisa del pasado a través del análisis sistemático de testimonios escritos de distinta procedencia, por lo demás imbuidos por diferentes intereses, ideologías y puntos de vista.

En términos operativos, la investigación se desarrolló en tres etapas principales y conectadas. En la primera etapa, se realizó una revisión exhaustiva de la literatura académica para identificar las principales corrientes historiográficas sobre el Estado de derecho en Ucrania. Esta etapa permitió establecer un marco teórico sólido basado en estudios como el de Danilyan et al. (2022), quienes analizaron la transición del sistema legal ucraniano desde el periodo soviético hacia un modelo romano-germánico entre 1990 y 1996. Definitivamente, este análisis inicial fue muy útil para comprender cómo las ideas sobre derechos humanos y soberanía se integraron en el discurso jurídico contemporáneo y sirvieron para configurar una agenda política de lucha y rebelión ciudadana.

En la segunda etapa, se llevó a cabo un análisis crítico de los eventos históricos clave que moldearon las ideas políticas y jurídicas en Ucrania. Esto incluyó momentos como las proclamações de la Rada Central en 1917 o la independencia de Ucrania en 1991. El alcance de esta etapa fue contextualizar cómo estos eventos reflejaron tensiones entre tradiciones locales e influencias externas. Finalmente, se sintetizaron los hallazgos para identificar patrones discursivos que han persistido o evolucionado a lo largo del tiempo, como lo ilustra la reciente investigación sobre descolonización y neonacionalismo en Ucrania de Udelín y Álvarez (2023). Mas allá de sus limitaciones, esta metodología asegura una comprensión integral del desarrollo histórico del Estado de derecho en Ucrania.

— Fundamentos históricos e intelectuales del Estado de derecho en Ucrania durante el siglo XIX: Las tradiciones jurídicas locales

Tal como refiere Kanarbik (2019), en el siglo XIX, los fundamentos históricos e intelectuales del Estado de derecho en Ucrania estuvieron profundamente influenciados por las tradiciones jurídicas locales y el contexto político de dominación imperial de los Zares. Un hito destacado fue la Constitución de Pylyp Orlyk de 1710, considerada como uno de los primeros documentos constitucionales modernos en Europa, que establecía taxativamente la separación de poderes y ciertos derechos fundamentales para los cosacos ucranianos. Si bien concebida en un contexto militar y político específico, esta constitución, en tanto contrato social, reflejó una temprana aspiración hacia un orden jurídico basado en principios democráticos y de autogobierno. Este pasado histórico es importante para entender la especificidad de Ucrania, toda vez que:

For decades, Ukraine has distinguished itself from the rest of the ex-Soviet republics located in Europe. Ukraine has neither become a strategic partner with Russia as its northern neighbour (Be-

larus) nor managed to become part of integrated Europe as the Baltic states. Furthermore, Ukraine is exceptional in many ways among the post-communist countries because most of them have either chosen full democracy and 'Western values' or authoritarianism, but Ukraine has instead floating somewhere in between these (geo)political spheres (Åslund, 2009). Also, despite the ruling oligarchy and its impact on the society, Ukraine has stayed relatively democratic with free media (Åslund, 2009). (Kanarbik, 2019, p. 1)

Por su parte, el llamado renacimiento nacional ucraniano en la segunda mitad del siglo XIX también jugó un papel clave en la formación de ideas políticas y jurídicas. Intelectuales como Mykhailo Drahomanov abogaron por un modelo federalista que combinara autonomía regional con derechos individuales, influenciado por las ideas liberales europeas que conoció muy bien. Según estudios de Veiga (2024), Drahomanov criticó tanto el autoritarismo zarista como el centralismo ruso, proponiendo una estructura descentralizada de gobierno que respetara, en teoría, las tradiciones locales. Estas ideas se difundieron a través de publicaciones y círculos intelectuales, sentando las bases para una conciencia jurídica moderna entre las élites ucranianas.

Para autores como Abrámov (2017), otro aspecto crucial fue la resistencia a las políticas represivas del Imperio ruso, como la prohibición del idioma ucraniano en esferas públicas y educativas. Estas restricciones llevaron a una mayor valorización de las tradiciones legales consuetudinarias, especialmente en áreas rurales donde prevalecían formas comunitarias de resolución de conflictos. En su esencia, el sistema consuetudinario, aunque informal, actuó como un contrapeso a las imposiciones legales imperiales y ayudó a preservar elementos clave de la identidad jurídica ucraniana.

El movimiento decembrista también tuvo un impacto significativo en Ucrania, particularmente a través de la Sociedad del Sur fundada en 1821. Este grupo promovió ideas constitucionales y republicanas que influyeron en los debates sobre el futuro político y jurídico del país (Danilyan et al., 2022). A pesar de que el levantamiento decembrista fue sofocado, sus ideales continuaron inspirando a generaciones posteriores de pensadores políticos ucranianos. Estos eventos históricos subrayaron la importancia de conectar las aspiraciones locales con los desarrollos políticos más amplios en Europa, tendencia que permanece activa en la actualidad en las mentalidades políticas de los grupos de poder y en la ciudadanía en general.

Por todas las razones aludidas, los fundamentos históricos e intelectuales del Estado de derecho en Ucrania durante el siglo XIX se basaron en una combinación dialéctica de tradiciones jurídicas locales, resistencia al autoritarismo imperial e influencias intelectuales europeas. Personajes como Pylyp Orlyk y Mykhailo Drahomanov, entre otros, desempeñaron roles clave al articular visiones políticas que buscaban reconciliar autonomía regional con principios democráticos universales. En su conjunto, estos elementos ideológicos no solo preservaron la identidad jurídica ucraniana frente a la opresión externa, sino que también, y esto es lo realmente importante, sentaron las bases para futuros desarrollos políticos y legales hasta la actualidad.

— Principales transformaciones sufridas bajo el régimen soviético y su impacto en las ideas políticas ucranianas

En palabras de Arendt (2008), el régimen soviético en Ucrania se caracterizó por un sistema jurídico e institucional centralizado, basado en el control absoluto del Partido Comunista. En consecuencia, la estructura legal estaba diseñada para implementar los principios del socialismo marxista, subordinando todas las instituciones al imperio del partido único. Las constituciones soviéticas,

como la de 1937 y la de 1978, formalizaban derechos y libertades que, en la práctica, eran inoperantes debido al predominio de los intereses del partido y a su afán de edificar una sociedad de pensamiento único, sin espacio para la crítica o la disidencia. El sistema judicial no era independiente y servía como una herramienta hegemónica para imponer políticas estatales y reprimir disidencias. Este modelo totalitario transformó profundamente la naturaleza de las instituciones legales y políticas en Ucrania.

Tal como lo vivieron los propios autores de esta investigación, en la práctica, el régimen soviético en Ucrania operaba como una extensión del aparato centralizado de Moscú, con una arquitectura política autoritaria. El poder real residía en el Comité Central del Partido Comunista de Ucrania, que seguía mecánicamente en la mayoría de los casos, las directrices del Partido Comunista de la Unión Soviética. Si bien existían instituciones como el Soviet Supremo de Ucrania, estas eran meramente simbólicas y carecían de autonomía real para tomar decisiones importantes. Tal como sostiene Khanyk-Pospolitak (S/F), en este contexto las elecciones eran controladas y los candidatos eran designados por el partido, lo que eliminaba cualquier posibilidad de pluralismo político. Este sistema consolidó un modelo autoritario que suprimió las tradiciones democráticas locales y reforzó la dependencia de Ucrania respecto a Moscú.

La idea soviética de Estado de derecho estaba supeditada al socialismo y a los intereses del Partido Comunista. En lugar de garantizar derechos individuales, el derecho era concebido como un instrumento para implementar políticas económicas y sociales centralizadas. La propiedad privada fue abolida y reemplazada por la propiedad estatal o colectiva, reflejando la ideología socialista (Lander, 2008). Además, el sistema legal excluía cualquier noción de separación de poderes o independencia judicial. Como resultado, el concepto soviético de Estado de derecho se alejaba radicalmente de los estándares occidentales de tipo liberal, priorizando los objetivos colectivistas del partido comunista sobre cualquier principio jurídico universal.

Como es lógico suponer, las transformaciones sufridas bajo el régimen soviético tuvieron un impacto profundo en las ideas políticas ucranianas. La imposición del socialismo soviético eliminó las tradiciones jurídicas nacionales basadas en el derecho consuetudinario y democrático que habían caracterizado a Ucrania antes del siglo XX. Sin embargo, también generó tensiones internas que alimentaron movimientos nacionalistas y pro autonomistas dentro de la élite intelectual ucraniana. Estas tensiones se manifestaron especialmente durante los períodos de colectivización forzada y represión política bajo Stalin, lo que reforzó un sentimiento de resistencia hacia el centralismo soviético (Arendt, 2008).

En términos críticos, aunque el régimen soviético introdujo ciertos elementos modernizadores como la alfabetización masiva y la industrialización, su impacto en las ideas políticas ucranianas fue mayormente negativo. La falta de autonomía política y jurídica debilitó las capacidades locales para desarrollar un modelo propio de Estado de derecho. Sin embargo, estas experiencias también sembraron las semillas para futuros movimientos independentistas que buscaron restaurar la soberanía ucraniana tras el colapso de la URSS en 1991. En este sentido, las transformaciones soviéticas dejaron un legado contradictorio: modernización estructural acompañada de una profunda erosión democrática, situación similar a lo sucedido material y simbólicamente en todas las exrepúblicas soviéticas que conformaron la URSS.

— Características ontológicas del periodo posterior a 1991 en Ucrania: Discursos políticos y lucha por la autonomía nacional

La independencia de Ucrania en 1991 marcó un punto de inflexión histórico, permitiendo la reelaboración de un proyecto nacional basado en la soberanía y la integración europea. Tras décadas de dominio soviético, el referéndum de diciembre de 1991 —avalado por el 92% de la población— reflejó una aspiración colectiva por construir un Estado democrático alejado de la órbita rusa (Delegación de la Unión Europea en México, 2023). Este proceso incluyó gestos simbólicos, como la renuncia al arsenal nuclear heredado de la URSS en 1994, evidenciando la voluntad de adoptar estándares internacionales de seguridad y transparencia. La transición política e ideológica, sin embargo, enfrentó y enfrenta desafíos estructurales, como la herencia de instituciones soviéticas obsoletas y la necesidad de reconciliar una identidad nacional fragmentada por siglos de dominación imperial.

A pesar de los avances iniciales, la consolidación de la soberanía ucraniana se vio obstaculizada por tensiones internas y presiones externas. La corrupción endémica y la influencia rusa —materializada en la anexión de Crimea en 2014— pusieron en riesgo el proyecto europeísta. No obstante, movimientos como el Euromaidán (2013-2014) demostraron la persistencia de un discurso ciudadano que vinculaba la democracia con la integración occidental (BBC News Mundo, 2022). Estos acontecimientos subrayaron la dialéctica entre un pasado soviético autoritario y un presente que buscaba arraigar principios como el pluralismo y el Estado de derecho, incluso bajo la amenaza constante de agresión externa por parte de Rusia.

Para Oleinikova (2019), entre los temas de los discursos políticos contemporáneos destaca el esfuerzo por desvincular la identidad nacional del legado soviético mediante políticas de descomunización. Este proceso, analizado por Oleinikova (2019), implicó la eliminación de símbolos soviéticos y la reivindicación de figuras históricas como Stepan Bandera, reinterpretadas como íconos de la resistencia anticolonial. Paralelamente, intelectuales y líderes políticos han promovido una narrativa que vincula al Estado ucraniano con tradiciones europeas, enfatizando valores como los derechos humanos y la separación de poderes, en contraste con el autoritarismo ruso. Para entender este proceso histórico hace falta un aparato teórico y analítico que:

In sum, the retrospective analysis of transition research from the 1950s until the early 2010s presented in this paper shows that within the transition paradigm, popular in Eastern and Western European social science, scholars have found that the incorporation of such theoretical concepts as human agency and structural factors bears more fruit in capturing empirically and explaining theoretically the long-term effects of social change at individual and collective levels, as well as their residual effects on structural transformations. (Oleinikova, 2019, p. 163)

Desde el punto de vista de los autores de esta investigación, otro eje discursivo relevante es la construcción de una memoria colectiva que reconcilie las experiencias traumáticas del siglo XX —como el Holodomor o la represión estalinista— con las aspiraciones democráticas actuales. En este orden de ideas, el presente histórico destaca cómo la guerra contra Rusia ha reforzado una identidad nacional basada en la resistencia, articulando el pasado de opresión con la lucha contemporánea por la libertad nacional (BBC News Mundo, 2022). Este relato no solo busca legitimar el proyecto europeísta, sino también contrarrestar la propaganda rusa que minimiza la identidad histórica ucraniana.

En definitiva, la idea de Estado de derecho, desde la Ilustración hasta hoy, representa un dique contra la arbitrariedad del poder. En Ucrania, este principio ha sido fundamental para limitar los abusos de élites políticas y económicas, especialmente tras la Revolución de la Dignidad. Como

señala Chávez (2023), sin un marco jurídico coherente que garantice derechos básicos y controle a las instituciones, la democracia se reduce a una fachada. Por lo tanto, la adopción de reformas anticorrupción y la independencia judicial —condiciones para la candidatura de Ucrania a la UE— evidencian cómo el Estado de derecho opera como mecanismo de contención frente a prácticas autoritarias heredadas o emergentes.

CONCLUSIONES

En el siglo XIX, las ideas sobre el Estado de derecho en Ucrania se desarrollaron en un contexto marcado por la dominación imperial y los esfuerzos por preservar en esencia y existencia una identidad nacional ucraniana. En este contexto, intelectuales como Mykhailo Drahomanov promovieron un modelo federalista que combinaba la autonomía ucraniana con principios democráticos y de libertad individual, en oposición al centralismo del Imperio ruso. En su conjunto, estas ideas reflejaban un intento de reconciliar las tradiciones locales, como el derecho consuetudinario, con influencias europeas, lo que contribuyó a la formación de una conciencia jurídica moderna entre las élites ucranianas. Sin embargo, el desarrollo institucional fue limitado debido a la falta de independencia política y la represión rusa.

Durante el período soviético, los discursos sobre el Estado de derecho en Ucrania fueron moldeados por el marco ideológico del marxismo y el comunismo. Si bien nominalmente Ucrania tenía instituciones republicanas, estas eran subordinadas al control centralizado del Partido Comunista. Por lo tanto, el sistema legal soviético se utilizó como herramienta para implementar políticas estatales y reprimir disidencias, lo que eliminó muchas tradiciones jurídicas locales. A pesar de ello, la identidad jurídica ucraniana no desapareció por completo, ya que las tensiones inherentes al sistema soviético permitieron ciertas manifestaciones de autonomía cultural y administrativa. Este período que duró buena parte del siglo XX dejó un legado contradictorio: estructuras legales formalmente modernas, pero profundamente autoritarias.

Con la independencia en 1991 tras el colapso de la URSS, el Estado de derecho adquirió una nueva relevancia en Ucrania. La Declaración de Independencia y su ratificación mediante referéndum reflejaron un fuerte deseo popular de construir un estado soberano basado en principios democráticos modernos. Sin embargo, los primeros años estuvieron marcados por una falta de visión clara sobre cómo estructurar este nuevo Estado por parte del liderazgo político en el ejercicio del poder. Las reformas constitucionales y legales avanzaron lentamente, influenciadas de forma contradictoria tanto por el legado soviético como por las aspiraciones europeas. De cualquier modo, este período sentó las bases para una transición hacia un sistema jurídico más alineado con los estándares internacionales liberales.

En el siglo XXI, las ideas de soberanía nacional y de Estado de derecho han adquirido un significado renovado para Ucrania, especialmente en el contexto del conflicto con Rusia. Desde febrero de 2022, la guerra ha reforzado el discurso sobre la importancia de la independencia política y jurídica como pilares fundamentales del Estado soberano ucraniano. Igualmente, la aspiración a integrarse plenamente en la Unión Europea ha impulsado reformas legales destinadas a fortalecer las instituciones democráticas y combatir la corrupción. En este contexto, el Estado de derecho no solo es visto como un ideal jurídico, sino también como una herramienta cívica esencial para garantizar la supervivencia y prosperidad del país a pesar de la impronta del vecino invasor.

En una mirada de síntesis, los discursos e ideas sobre el Estado de derecho en Ucrania han evolucionado dialécticamente desde nociones federalistas y consuetudinarias en el siglo XIX, hasta convertirse en un elemento central del proyecto nacional contemporáneo. Marcados por tensiones históricas y desafíos externos e internos, estos discursos han sido fundamentales para articular las aspiraciones democráticas y soberanas de Ucrania. Desde su lucha contra la dominación imperial hasta su resistencia heroica frente a agresiones externas en el siglo XXI, el Estado de derecho ha sido tanto un objetivo como un medio para afirmar la identidad nacional ucraniana en un escenario geopolítico crítico.

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INTERACCIÓN Y PERSPECTIVA

Revista de Trabajo Social

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- Memorias de Congresos: Morales, Osiris: Programa de prevención integral en drogas como estrategia de intervención en las comunidades. pp. 99. Congreso de Trabajo Social –II Internacional y IV Nacional-. Maracaibo, Venezuela, 2000.
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