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Section 1. Study of art

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L'ILLUSTRAZIONE ITALIANA: A SOURCE FOR MUSEOLOGICAL RESEARCH

Abstract. *L'Illustrazione Italiana*, the magazine founded in 1873 by Emilio Treves, has been the focus of research mainly concerning political, military and social history. There is no shortage of contributions on the history of illustration and photography or collaborators of a certain importance, but much remains to be explored on museological problems.

Keywords: museums, art, cultural Heritage, journals.

First-hand material from journals provides the stimulus to tackle less conventional and often unexpected lines of research. The study of the critical attitudes preserved in them changes the method of observation which, in this new perspective, must adapt to a much more extensive and varied information context. Periodical publications, compared to the printed volume, obey the logic of timeliness and immediate comment on events; through these media it is possible to follow debates, to make criticisms, because "chi ha qualcosa da dire, chi ha dottrine da combattere o da far valere, giudizi da proporre o da correggere, interessi spirituali da suscitare, sente il bisogno di una comunicazione viva, varia e continua col pubblico degli studiosi e lettori" [1, 410]. Periods of our artistic past, historiographical problems and characters often ignored, or veiled, by "known History", find expression in these exceptional mines of information.

A first reflection on the role played by periodicals in Italian life was undertaken at the conference organized by University of Turin in 2002 [2], the

first international study meeting organized in Italy specifically dedicated to art magazines. Further and more systematic works, characterized by important monographs on little-known periodicals, were presented by Laboratorio Arti Visive della Scuola Normale Superiore of Pisa (between 2007 and 2011) [3; 4], at the 2006 Milan [5] and the 2012 Santa Maria Capua Vetere [6] conferences.

Thanks to these researches, supported by the creation of catalogs and computerized databases, today it is possible to understand with greater awareness the value of this kind of sources in the field not only of literary research, but also in that of art criticism, history and the preservation of cultural heritage. However, beyond what is widespread among a very small number of specialists, much remains to be done, as regards historical-artistic and museological research, on information and training tools not exclusively dedicated to art and aimed at wider segments of readers. A significant step forward in this sense was achieved through a study which, completed in

2013 and carried out with the help of four research groups from four universities (Florence, Milan, Roma Tre and Udine), revealed that the press did not specialist topics of critical discussion and visual success of twentieth-century works usually rarely addressed by art historians [7]. The challenge was to trace the idea that had developed, over the course of the century, around the modern artwork and its creator, outside the narrow circuit of actors and users of the art system, and understand how much this diverged or coincided with that which later passed in the historicization of essays and manuals.

To this type of approach, which aims to outline parallel paths to canonized history, look at the research proposed here, centered on the image and the role of the museum communicated in Italy by one of the longest-running national weeklies in the history of Italian publishing.

Distributed in all Italian regions and even abroad, *L'Illustrazione Italiana* was for many years the great illustrated current affairs magazine that addressed to the middle class. On December 14, 1873, in Milan, with the title *Nuova Illustrazione Universale*, the Trieste publisher Emilio Treves decided to launch a new illustrated periodical. After a brief presence on the market as *L'Illustrazione Universale*, the weekly magazine acquired the definitive name, from the 1st November 1875, *L'Illustrazione Italiana* and was on newsstands until 1962, the year in which the magazine, already owned by Garzanti since 1938, ceased publications. A year after his interruption, almost as if he did not want to lose his memory, Flavio Simonetti edited the first contribution dedicated to the magazine. The scholar, in addition to examining in detail the protagonists, the themes and the most important collaborators, composed a sort of “*storia figurata del tempo*”, that is a pleasant tool to travel through a history of about ninety years, through the most significant pages of the magazine [8]. More detailed information on the dynamics linked to the birth of the newspaper, its editorial project and the prominent place it managed to conquer in periodic

journalism, was offered by Massimo Grillandi in the biography dedicated to Emilio Treves [9]. The same news passed to the scrutiny of Michele Giordano who traced the genealogical tree of the periodical, starting from the bud of the *Museo di Famiglia*, passing through *L'Universo Illustrato* and *La Nuova Illustrazione Universale*, up to the luxuriant flowering of *L'Illustrazione Italiana* [10].

In examining the different strands of contemporary journalism, various scholars have subsequently dealt with the problem of the illustrated press and the peculiarities of the magazine in question in a historical key [11; 12; 13].

An enlargement of the field of investigation however, it is identified in the essay by Nello Ajello which examines the continuous “*ossequio*” at the “*mitologia nazionalborghese*” underlying the editorial choices of the Treves house [14].

There was no “*a figure*” magazine was able to record in such a timely manner situations, topics and events that had, at national and international level, a certain importance and reserve a lot of space for art and artists. Anyone who has set out to write about Italy's past as a united country could not help but steal this illustrated Italian history. The appeals and references to the writings and illustrations published in *L'Illustrazione Italiana* were in fact very numerous and an overview allows us to see how the attention for the periodical was born in the context of research centered mainly on political, military and social history [15; 16; 17; 18] [19; 20; 21; 22]. There is no shortage of contributions regarding the history of illustration and photography [23; 24; 25; 26] or collaborators of a certain importance [27], but much remains to be explored on artistic issues [28].

On the side of museological and museographic criticism, with the exception of the analyzes carried out on the periodical by Nadia Barrella and by Donata Levi, there are no investigations on the subject. Barrella's work is the result of a first systematic review of the magazine in this direction and concerns the issues published between 1875 and the end of

the nineteenth century, years in which the cultural heritage was the subject of a museographic administration [29]. A different perspective follows Donata Levi's essay, based on the visual documentation relating to art museums in Italian periodical publications of the early decades of the twentieth century, both of disciplinary and more general content. The analysis highlights a significant absence of images from museum exhibitions in periodicals dedicated to the history of art. In reverse, in magazines of greater consumption, such as *L'Illustrazione Italiana*, she distinguishes a wide range of solutions to communicate, both events related to museums and their characteristics and purposes, to a wider audience in [30].

Starting from the considerable wealth of information that emerged from these first approaches, it would be interesting to extend the scope of investigation to other years of the magazine not yet sounded, in order to evaluate some absolutely unknown aspects of the Italian museum offer. The object of reflection could be not only the museum in its generality, its form and its configuration in a specific historical, political and social reality, but also the attention given to Italy, between the post-unification era and the first half of the twentieth century, to Cultural Heritage and to the preservation of places and of homeland memories.

In the period in which Italy, from an agricultural country, fragmented into dozens of small states, dialects and local customs, was gradually moving towards that modernization that would soon homogenize habits and institutions, Emilio Treves chose to give life to a illustrated weekly that represented the young nation. Shunning any form of regionalism, the publisher introduced a tool on the market of "primo potere" [31, 2] useful for the formation of a wider civil society than in religious traditions, in popular memories, in the search for a linguistic unity, in the artistic Heritage, in the sciences and in the letters, it could have found its own identification.

The civil society to which the newspaper addressed was the upper middle class, or the ruling

class of the country, the main user of museums in the second half of the nineteenth century. From the pages of *L'Illustrazione Italiana* nothing emerges other than the strategies implemented in the museum field by public administrations and the idea of a museum communicated to this type of user/reader. However, we must consider that as social changes, cultural and economic, during the twentieth century, led to a substantial change in the meaning and significance of museum institutions, in the same way, the trajectory of the magazine, compared to its original target audience, has undergone significant changes over time. Consequently, it will be essential to proceed on a double track: bearing in mind, on the one hand, the evolution of the magazine and the "audiences" to which it has addressed over the years, and on the other, the museum model disclosed from time to time. At the turn of the century, the Treves newspaper was for every wealthy family "come avere una figlia che suoni il piano e sappia affrontare un discorsetto in francese" [32; 180].

Its primacy he began to be questioned with the extension of the readers to non-bourgeois bands that he took away to the magazine the representative function of an entire sociological universe. From 1880 to 1895 the publishing industry experienced a period of substantial development determined by the general economic and cultural growth of the population. There was a regression of illiteracy and therefore the enlargement of the audience of potential readers. Then the creature of Treves was threatened and surpassed, in conception and workmanship, by *La Domenica del Corriere*, *La Tribuna Illustrata* and *L'Illustrazione del popolo*, illustrated supplements to major news dailies.

They were newspapers for everyone, conceived for medium-low culture environments, up to the limits of semi-illiteracy or returning illiteracy, with a deliberately interclass type of approach and a strong visual imprint facilitated by the introduction of color [33; 34]. Meanwhile, *L'Illustrazione Italiana* remained only a symbol of distinction and its golden age was

totally extinguished in the first years of the fascist regime. Already in the early 1980s, the newspaper's vision began to no longer identify itself with the vision of the ruling class: the political class of men on the left had now taken over with the not so much to "make" the Italians but to reform them. Under the influence of the socialist weight there was an enlargement of the liberal state and social strata emerged ready to acquire a different awareness of their own needs. The ruling class, for its part, found itself facing the difficult problem of their nationalization, or rather, their insertion into institutional life, which will only be completed in the Giolitti era [35; 524] [36; 23].

With regard to the idea of a museum and of the national cultural heritage in its generality which is derived from *L'Illustrazione Italiana*, it coincided, at least until the 1880s, with that of the political class in power. However, since the magazine always programmatically avoided regionalist connotations, the contributions in its publications allow you to understand too as the requests presented by the various power groups interfaced and the relationship that was established between the politics of cultural Heritage and public opinion. The magazine was born and lived its moment of maximum splendor just in the period in which the museum began to take shape as a cultural organism which was given a precise educational function. The "museo della città" [37; 18] experienced an intense vitality in these years. Responding to the needs of the different municipalities, just integrated into a centralized state system, to bring out their own traditions, the local museums were not only identified as containers for the conservation of the memories of the city and the territory, but also as places whose main function was to serve the city as a study tool from which to draw to encourage the development of a civic and cultural identity [38]. The great season of civic museums then started at sunset when the local autonomies, in the face of increasingly accentuated legislation and state administrative order, gradually lost their role. With the first national protection law, the Nasi law of 1902 (L. 185), and then with the Rosadi law of 1909 (L. 364),

preservation prevailed over all other functions of the museum institute.

The museum, which became an appendix of the superintendency, assumed only the task of the mere custody of the masterpieces without particular obligations towards the public [39; 40; 41]. Among the pages of the periodical, the roots of "anomalìa italiana" [42; 22] are reflected through individual episodes and the responses of the various centers of the country were different, not only in the face of this turning point, but also to the international debate which, following the political expansion of the concept of a liberal state, was changing the role and functions of the museum.

First of all, the magazine gives the opportunity to fill a gap that concerns many Italian museums, especially the nineteenth-century museums; studies proliferate on the modalities of their constitution, on their cultural purposes and on the importance they have assumed in the process of conservation of cultural Heritage, but there is a lack of reflections on the subjects who acted within them, on the tools used to communicate with the public (captions, panels, signs, guides, catalogs) and, above all, the research on the criterion adopted for "making the collections speak" [43]. From the analysis of the material they could emerge the reasons behind the many failures and the backwardness of much of the Italian exhibition system. In particular, it would be interesting to identify the transformations that affected museums between the two wars and to determine how much was felt also in Italy the need to adapt the various exhibition centers to the lively international debate. The same debate that was changing the models and functions of the museum and which, thanks to the OIM, it led to the first international conference in Madrid in 1934. The limited knowledge of these transformations is the result of a culture that has roots in the postwar period, when the great renovation of all those museums that had been victims of evictions, occupations and damage caused by bombing began. For some museums it represented an im-

portant moment to seriously remedy, in the light of their peculiarities and their needs, to the long-standing cultural and structural delays, but for the most part it resulted in a passive adjustment to those social and cultural issues that museums were pursuing on an international level since the 1920s and 1930s. In fact, in many museums the outcome of this adaptation was nothing more than an uncritical recovery of a certain type of object, released from specific educational purposes and motivated by purely aesthetic logic [44; 45].

L'Illustrazione Italiana, whose importance is consecrated, not only by the kaleidoscope of information provided by the textual part, but also, and above all, by the rich repertoire of images, reveals the concrete possibility of reconstructing certain dynamics and this would also mean questioning the well-established image of the Italian museum which, after a long period of stagnation that began in the second half of the nineteenth century, it starts to “renaissance” only in the 1950s with the interventions of architects such as Albini, Bassi, Boschetti, Scarpa.

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A STUDY OF SPATIAL NARRATIVE IN OF MICE AND MEN

Abstract. In his novel *Of Mice and Men*, American writer John Steinbeck portrays two farm workers, George and Lenny, who depend on and support each other. The two heroes struggle to survive on the edge of a brutal society, where a strong friendship and shared vision are finally strangled by brutal reality. Through the meticulous description and cutting combination of different Spaces, the novel reflects the geographical space of nature and reality, the space-time space of three parallel clues and the interlacing and opposing text space. Based on space writing, this study interprets the themes of loyal friendship, loneliness and disillusionment of hope in the novel, reveals the author's criticism of the contradictory relations between man and man, between man and nature, between man and land, and his longing for a harmonious society in the future.

Keywords: of *Mice and Men*; cartographic space; space-time space; text space.

Of Mice and Men is Steinbeck's second of three books based on California farm workers. The text mainly tells the story of the Great Depression in the United States, the two main characters Lenny Small and George Milton as temporary farm workers have just lost their jobs due to mistakes on the previous farm. The two traveled to California to find work and fight for the ideal of owning their own land. Lenny was mentally handicapped and stupid, but possessed of unparalleled strength and did George's bidding. George is smart and the decision maker of the two. Through the depiction of different Spaces, the article vividly shows the mental state and living conditions of farm workers in the era to the readers.

1. Cartographic space

In his book *Narrative Theory towards Space*, Zora Gabriel expounds the narrative theory system that takes spatio-temporal factors into consideration at the same time. The main theoretical result is that he puts forward and explains three paradigms of different levels of spatio-temporal construction: cartographic space, spatio-temporal space and text space. In *Of Mice and Men*, there are many descriptions about the space of the topography. But the most ink

in the text is the nature and reality of two specific spatial levels.

1.1 Natural space

In almost every chapter of the text, the author begins with a delicate and touching description of the surrounding vibrant natural scenery and lively animals. For example, at the beginning of the article, the scenery around the Salinas River was described, "The Salinas River flows quietly, and when it reaches several kilometers to the south of Soledad, it suddenly approaches the foot of the mountain, and the water suddenly turns dark and green ... Only the low-hanging branches occasionally left a few leaves." At the beginning of the article, the poetic power is exhausted, and it is also the beginning of the dreams of the two protagonists. The contradiction between the beautiful fantasy and the cruel reality in the whole article starts from the beauty of this moment. There is still a long scene at the end of the article, As George is about to shoot Lenny, the scene is described in a quiet and tragic way. There is another bright spot in the description of natural space, which is the vivid description of animals and the metaphor of animal behavior to human action. The article begins: "The

leaves are so dry and brittle that a lizard would slide over them. At dusk, rabbits emerge from the bushes... Some are raccoons, some are farm dogs with pointy toes, and the wedge-shaped ones are deer that come to the river to drink at night." At this time the animals are full of life, charmingly naive. The long description is full of the author's love of nature. At the end of the article, the scene of a heron preying on a water snake symbolized the scene of George shooting Lenny. "A water snake glides lightly across the water... The heron stood motionless in the shallow. Then, all of a sudden, it lowered its head noiselessly and closed its long beak on the water snake's head. George took Lenny off guard when he was looking across the river and shot him dead.

1.2 Real space

The description of their real life space is mainly focused on their new working farm, which is detailed and reflects the difficult living conditions of farm workers in the era. In the writing space of the farm, a series of supporting characters are vividly depicted. The author begins: "The settlement is a long rectangular building with whitewashed walls... There were wooden boxes round the table for the players to sit on." There is also a description of Crook's harness room: "There is a small house next to the stable, which is the harness room... The little room had a square cross window on one wall and a narrow slatted door on the other... Crook's bed had an apple box nailed to it, and a row of medicine jars on it." The author gives a detailed and detailed description of the spatial levels of George and Lenny's real life, mainly relying on the scope of activities of the protagonists, especially Lenny. The living environment of farm workers is made up of small Spaces such as rectangular squatters, Crookstalls and open Spaces where workers play horseshoes.

2. Space and time

Einstein's term "space-time body" was incorporated into the field of literary criticism by Bakhtin, who defined it as "a complex of time and space, including objects, events, psychology, history, etc."

However, in Zolon's three-tier structure paradigm, space-time space is defined as "a category that can be integrated by space and time as motion and change". Moreover, these spatio-temporal relations gradually embodied in the narrative can be divided into synchronic and diachronic relations. Synchronic relations refer to the textual content embodied in the narrative in both motion and stillness. Diachronic relation refers to the fact that in a specific narrative space, the development direction of space-time body, the main line of creation, the axis of movement and the force of will all play a role in space. The main feature of space-time space in *Of Mice and Men* is that three narrative clues are parallel, resulting in the cutting combination of space-time. Many blank structures in time and space emerge as the narrative progresses. The reader's doubts in the process of reading are gradually solved, and the narration of multiple spatial dimensions is parallel and complementary to each other.

This is best illustrated by the descriptive narration of the time that took place on the three farms. The first farm is the old farm where George and Lenny made a mistake and were forced to escape. The first mention of the farm is in Chapter one, when George reminds Lenny that "he did a terrible thing on the old farm, and he will never do it again." A short sentence, coupled with the escape of George and Lenny at the beginning of the article, greatly aroused the reader's interest in the old farm event. It isn't until George and Slim's chat in chapter 3 that Lenny is arrested as a rapist for clinging to the girl's skirt at the old farm. The story of the old farm also hints at where the main clue is heading. The second farm is the farm where George and Lenny work, and it is also the main place where the events of the text take place, which is also the main narrative clue of this paper. George and Lenny encounter a variety of characters while working on their new farm, culminating in Lenny losing control, strangling the farmer's daughter-in-law and escaping, only to be found and shot by George. The third farm is George and Lenny's fantasy private farm. The author gives a

vivid and detailed description of this utopia in another time and space. Then chapter three's vision of an ideal private farm even draws in another aged and helpless farm worker, Candy. Even in the face of Candy's skepticism, George adds a realistic way to own an ideal farm. Until the fourth chapter, the new partner Candy has great enthusiasm for the ideal farm, the idea of the farm attracted another black horse crook. That was the end of the description of the ideal farm. No matter the description of the old farm, the working farm or the ideal farm, there is a cutting combination of time and space. The three space-time clues gradually show their original appearance in the activities of the protagonist, and the space-time relations exist or change in the development of the plot, which together constitute the construction of the author's text.

3. Text space

Dren's explanation of text space is that "spatial structure acts on space through the content expressed in language text". At the level of text space, the author creates a structured material schema representing the world, focusing on the selectivity of language, linearity of text and unity of structural viewpoints in text. In *Mice and Men*, the author clearly shows the antagonism between race, gender, and human and animal through the division between the laborers and the harness, the division between men and women, and the division between man and animal.

3.1 Antagonism between blacks and whites

The antagonism between blacks and whites is particularly evident in the textual space. The isolation of the black Crook's premises from everyone else suggests racial antagonism. The farm where George and Lenny work has an unwelcome black groom named Crook. More than once, the article describes the isolation between Crook and other people. "I'm not allowed in your camp, and you're not welcome here... They play poker over there, but they won't let me play because I'm a nigger. It is through this description that the author highlights the racial confrontation of *The Times*, the discrimination and even oppression of white people against black peo-

ple. The article writes that Crook expressed surprise when Lenny stumbled into his room to see the newborn puppy and repeatedly told Lenny not to enter his room. When Candy, an old farm worker, went to the harreroom to look for Lenny. Crook tried desperately to look unhappy, but it was easy to see he was happy." This description highlights the high and low position in the discourse of power incisively and vividly. Crook's words highlight his inner loneliness and desperate need for company. Man himself is a social animal, and everyone is eager to express himself, even if he does not say anything, silent existence is also a kind of expression. But the isolated space did not give Crook this opportunity, and his heart was occupied by the loneliness of the opposite space.

3.2 The opposition between men and women

The opposition between men and women is mainly reflected in the opposition between Mrs. Curley and the whole spatial relationship of the farm. Mrs. Curley, the farmer's daughter-in-law, had been confined to the narrow space of marriage and family since her marriage. She was young and vigorous and had no window of perception and understanding of the outside world. In the article, Mrs. Curley often went to the workers' camp to find Curley under the pretext of communicating with the outside world and expanding her own living and activity space. But the farm workers always saw her as a slut and trouble. There are many references to farm workers talking about Mrs. Curley behind her back, flirting and flirting. When George arrives at the new farm and meets Candy, the first topic of conversation is to arrange Mrs. Curley. When Mrs. Curley went to look for him in his harness, His revulsion was clear. "I think you'd better go home. We don't want to get in trouble." Mrs. Curley tries her best to break through the divide in space, but the farm workers, who regard her as a monster and believe that she belongs only to the family side, unite with blacks and whites to strangle her freedom. In the only time she was alone with Lenny, the loneliness caused by the spatial opposition came out on the page. "Let's have a chat.

I have no one to talk to for a long time. ‘You can talk to a lot of people, but I can only talk to Curley. “Don’t I even have the right to talk to people? Then I don’t understand why I can’t talk to you? I’m not going to hurt you.” This series of descriptions constitute another level of mutual opposition in the text space. The opposition between men and women in the farm is very unfair to Mrs. Curley, the only woman on the farm, resulting in her loneliness for a long time, which echoes the main idea of the text.

4. Opposition between man and animals

The spatial opposition between human and animal runs through the whole text. This division and opposition are mainly manifested in two aspects. The first aspect is that in the range of human activities, that is, in the farm, animals are unhealthy, which is in sharp contrast to the vitality of animals in the natural state described by the author. The second aspect is shown by the public’s attitude towards Candy’s dog and Lenny’s rat and dog. The animals in the text, far away from humans, are full of exuberance and exuberance. The first chapter opens with a scene of nimble lizards, cunning rabbits, lithe rabbits and various animals in action. The animals in these descriptions all contain rich vitality and vitality. Farm animals are weak or sick. Candy, Slim, Lenny’s dog, and crook’s horse were all dead sick. The main antagonism between man and animal was the rejection of Candy’s dog and Lenny’s rat and dog by the people in the colony.

“Every time it entered the camp, I could smell it for two or three days”. the dogs belong in the barn, and the workers strictly divide the two Spaces. Lenny’s rats and dogs were the object of George’s boycott, and George bluntly warned Lenny, I told you not to bring puppies in here.” The obvious sense of space distance between workers and animals can better reflect the passive or active separation of socialized people from nature, and this kind of space cutting can better reflect the loneliness between people.

5. Conclusion

Of Mice and Men tells the story of George and Lenny, who dream of owning a piece of land of their own, achieving wealth and financial independence. That may be true today, but it was the unrealistic dream of many industrial workers during the Great Depression. The author’s exquisite use of spatial narrative techniques builds a complete and vivid spatial narrative structure by cutting and combining a series of Spaces, including geographical space of natural and realistic levels, space-time space of three parallel clues and text space of interlacing and opposing each other. The strengthening of spatial features deeply reflects the three themes of loyal friendship, loneliness and disillusionment of hope in the work. In addition, the text also profoundly reflects the author Steinbeck’s deep concern and sympathy for the agricultural workers and all the working people at the bottom of the Great Depression.

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Section 2. History and archaeology

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SEVERAL ETYMOLOGIES OF ANCIENT EASTERN, GREEK AND ROMAN TOPONYMS

Abstract. The present work substantiates the etymologies of some toponyms of ancient Eastern, Greek and Roman origin.

Keywords: Etymology of Akkad, Helinius, Holland, Samaria, Samarkand, Samur, Scheria, Simurum, Smyrna, Somme, Sumer, Zagros.

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НЕСКОЛЬКО ЭТИМОЛОГИЙ ДРЕВНЕВОСТОЧНЫХ И АНТИЧНЫХ ТОПОНИМОВ

Аннотация. В этой работе обосновываются этимологии некоторых топонимов древневосточного и античного происхождения.

Ключевые слова: Этимология Аккада, Гелиния, Голландии, Загроса, Самарии, Самарканда, Самура, Симурума, Смирны, Соммы, Схерии, Шумера.

Вследствие сложностей технического характера исходные написания слов неиндоевропейских и некоторых индоевропейских языков заменены в этой работе их нормативными латинизированными или кириллическими формами. Лексика, приводимая чёрным шрифтом, передаётся в ней без использования прописных букв.

Ранее всего переход к классовому общественному состоянию произошёл, как известно, в низовьях Евфрата (большой частью – в этих местах и меньшей – в нижнем течении Тигра) и Нила, то есть в Шумере и Египте. Шумеры, однако же, называли свою страну иначе (шумерск. **kiengi(r)**, переводы разнятся), себя – «черноголовыми

(людьми)» (шумерск. **saĝĝi(ga)**, **un saĝĝi**), а свой язык – **emegi(r)**, **emeĝir** (переводы разнятся). (Отметим, что «черноголовыми» – с.-китайск. **líshǒu**, **qiánshǒu** – простой народ называли когда-то и в Китае. И если шумерское **saĝ** передавало значение «голова, высший», то северокайское **shàng** – «верх, высший».) Ту же семантику, что у шумерского **saĝĝiga** имело и аккадское словосочетание **šalmāt qaqqadi**, повидимому, являвшееся калькой с него. Можно ли рассматривать шумерское **saĝĝi** как основу египетского обозначения Центральной и Южной Месопотамии, **sng(r)** (XV в. до н.э.)? Ответа на это у нас нет.

«Шумер» – слово не шумерского, а восточно-семитского происхождения. И первое известное упоминание его – аккадск. **šumerim** – относится к XXIII в. до н.э., вернее же – к правлению царя Аккада Римуша [1, 47, 48; 2, 8]. При том, что наиболее ранние тексты на восточносемитском аккадском языке датируются серединой III тыс. до н.э. На XXI в. до н.э. (правление царя Шумера и Аккада Шульги) и на XX в. до н.э. (царствование в Шумере и Аккаде Липит-Иштара) приходятся наиболее ранние из известных в настоящее время переводов на аккадский язык шумерского имени собственного **kiengi kiuri**, «Двуречье». Это – **māt šumerim u akadim**, «страна Шумера и Аккада» [3, 32; 4, 51]. Отметим также, что XXIII и XX столетия до н.э. были в общем не лучшим временем в истории Шумера.

Из аккадского языка известна и следующая лексика: (**lišān**) **šumeri**, **šumeritum**, **šumēru** «шумерский (язык)», **šumēru** «шумер», **sumaktar** «полукровный» (термин касситского происхождения второй половины II тыс. до н.э., когда шумеров как народа больше не существовало и на их языке уже не говорили). Слова же, объясняющие её этимологическую окрашенность, стоят в словарях аккадского языка рядом с теми, которые составляют предмет нашего внимания в настоящей работе. Это **šumēla** «слева», **šumēlānu** «левша» и **šumēlu** «левая рука, левая сторона, север». Пра-семитская форма восстанавливается в этом случае как ***šima'l**- «левая (сторона, рука)». При арабск. **šamāl** «север», **šimāl** «левая рука, левая сторона, плохая примета»; арамейск. **semmālāy** «левый, северный, отрицательный»; иврит **šəmo'l** «левая рука, левая сторона, север»; мехри **šaymāl** «левая рука»; сирийск. **səmālā** «левая рука, левый»; сокотри **šimhil** «левый»; угаритск. **šm'al** «левый»; шехри **šəmli** «левый» [5]. Тж.: коптск. **šmoul** «левый»; фарси **шемал** «север, левая сторона». «Шумер» значит тогда «территория, лежащая на левобережье Евфрата». «Шумеры» же – «люди, живущие (только) на левобережье Евфрата».

В аккадской письменности слово «Шумер» передавалось тремя клинописными знаками [6], первый из которых имел шумерское произношение **šū** и семантику «ладонь» (ср.: с.-китайск. **shōu** «ладонь»), второй – шумерское произношение **me** и значение «быть», третий – шумерское произношение **šub**, семантику «бросать» (ср.: с.-китайск. **shuǎi** «бросать») и аккадское чтение **ru**.

На конец XXIV – начало XXIII вв. до н.э. (правление царя Аккада Саргона) приходится и наиболее раннее упоминание земли Симу(р)ум – аккадск. **šimurum** [1, 8, тж. 87, 226], – «лево(бережно)й», которая лежала к востоку от Тигра, скорее всего, где-то между впадающими в него Нижним Забом, Диялой и Загросскими горами. (Этимология названия последних тоже восточносемитская, от аккадского **zaqru** – «высокий».) Считается, что к концу III тыс. до н.э. эти места имели хурритское население. В памятной надписи, посвящённой одному из великих князей Симу(р)у и выбитой на аккадском языке около XX в. до н.э., этот князь – Идди(н)-Син – равным образом именуется «царём (страны) Симуррум» (**simurri(m)**) [3, 7, 10].

Уже к VI в. до н.э. относятся и упоминаемые в Библии «цари Зимри, Элама и Мидии» (Иер. 25:25), первые из которых (иврит **zimirî**), возможно, имели отношение к обсуждаемому в этом разделе вопросу. Отметим, что русское «царь» тоже представляет собой слово восточносемитского происхождения (аккадск. **šar(ru)** «царь»).

Немало общего имел в этом отношении с шумерами и союз симаалитов (аморейск. **bini-sim'al** «левые»), в XIX–XVIII вв. до н.э. занимавших большей частью территории по левому берегу среднего Евфрата, севернее и восточнее Мари, лежавшего на его правом берегу, – столицы одноимённого царства. Правобережье среднего течения этой реки большей частью было тогда землями другого аморейского (аккадск. **amurru** «запад; амореи») союза, яминитов (аморейск. **bini-yamina** «правые»). Отношения между этими объ-

единениями не были дружественными. В основе их хозяйственного уклада лежало отгонное скотоводство, отчасти сочетаемое с земледелием. Великий князь симаалитов был и царём Мари. Левобережные амореи составляли тогда существенную часть господствующего класса и основу вооружённых сил этого царства. Последний правитель симаалитской династии, царствовавший в первой половине XVIII в. до н.э., носил имя Зимри-Лим (аккадск. **zimri-lim**). («Зимри» – иврит **zīmrī** – известно и как древнееврейское имя.)

Согласно библейской традиции, там, где в IX в. до н.э. в холмистой и плохо обжитой части Израиля был построен город Шомерон (иврит **šōmērōwn**), прежде стояло селение, называвшееся Шамиром (иврит **šāmīr**) (Суд. 10:1–2). В конце X в. до н.э. единое до этого Израильское царство разделилось на Израильское – северное – и Иудейское – южное – царства. Столицей первого из них стал Шомерон, второго – Иерусалим, до того бывший метрополией единого Израиля. Шомерон был расположен близ важных торговых путей, ведущих на север и запад [7, 456–457]. Территории Израиля и Иудеи в их совокупности не достигали границ прежнего Израиля, они оказались не в состоянии сохранить власть над чужеземными странами, входившими в его состав [7, 453]. На рубеже IX–VIII вв. до н.э. северное Израильское царство потеряло и большую часть тех земель, которые до того ему принадлежали. Так или иначе, уже в начале VIII в. в Ассирии, например, его обозначали как Самерину (ассирийск. **māt samerīnā**) [7, 468]. В конце VIII в. столица Израиля была захвачена ассирийцами, тогда союзными Иудее, и обращена в центр провинции Самерина. Это сопровождалось перекрёстными депортациями израильского населения в другие части Ассирийской империи и иноязычного населения из других частей этой империи в Самерину. Позднее арамейским названием её было **šāmārāyīn**, древнегреческим – **σαμάρεια**, латинским – **samaria**, арабским же – **as-sāmīrah**.

В части Библии, восходящей к началу VI в. до н.э., Шомерон сравнивается со старшей сестрой Иерусалима, вместе со своими дочерьми (другими североизраильскими селениями) живущей к северу (иврит **šāmōwlēk** «к северу/по левую руку от тебя») от него, а Содом – с его младшей сестрой, вместе со своими дочерьми (другими южноизраильскими селениями) живущей к югу от Иерусалима, рассматриваемым в этом случае как их средняя сестра (Иез. 16:1–3, 45–57, 61). Такая система координат соответствует восточной ориентации, например, при молитве на восходящее солнце, но противоречит требованиям иудейской веры и осуждалась в последней [8, 215–216]. Она, однако, имела место в Израиле прежде (Иез. 6:3–7) и во многом используется за его пределами верующими по настоящее время.

Принимая всё это во внимание, можно полагать, что название метрополии Северного царства, «Шомерон», значило «Северная (столица Израиля)», со временем же – и «Северное (царство Израиля)», «Северия», – «Самария» как название всей этой земли. Отказ от центричной ориентации (в исламе передающейся словом «кибла» – арабск. **qibla**, – ср. с аккадск. **qabla** «(в) центр(е)» и латинск. **cōpulo** «соединять, связывать»), предполагаемый этим, во многом уравнивал Шомерон и Иерусалим, прежде – столицу единого Израиля, теперь же – метрополию Южного царства, Иудеи, отношения с которым северного Израиля были как дружественными, так и враждебными.

Судя по изложенному Геродотом, древнегреческий город Эфес назывался так уже в середине VI в. до н.э. [9, 18 (1:26)]. Для половины же VII в. до н.э. Страбон пишет следующее: «... Эфесцы в древние времена жили совместно со смирнейцами, когда и Эфес назывался ещё Смирной. И Каллин где-то дает ему это имя, называя в молитве к Зевсу эфесцев смирнейцами [др.-греческ. **σμυρναῖοι** [10]]... Часть [же] эфесцев называлась [тогда] сисирбитами... Кроме того, какое-то место в Эфесе называлось Смирной, как

указывает Гиппонакт: «Имел обитель в Смирне града позади...» [11, 593 (14:4)]. Но последнее относится уже ко второй половине VI в. до н.э. Плиний пишет, что одним из имён этого города было «Саморнион» (латинск. **samornion**) [12, 381 (5:31)]. Стефан Византийский – что его называли также Саморной (др.-греческ. **σάμορνα**) [13, 128; 14]. По преданию, он был основан финикийцами [15, 691]. В середине VI в. до н.э. этот портовый тогда город был присоединён к Лидии, царь которой велел жителям селений, его составлявших, переселиться на равнину, ближе к храму Артемиды. Именно тогда он, по-видимому, и стал называться Эфесом.

Поселение, к началу X в. до н.э. основанное в этих местах греками – большей частью ионийцами, – лежало у Икарийского моря, слева от впадавшей в него реки Каистр. И этим оно не отличалось от остальных населённых мест, в совокупности и составлявших их город. Из чего, на наш взгляд, следует, что название «Смирна» передавало значение «(поселение на) лево(бережь)е». На аверсе его электровой монеты конца VII в. до н.э. выбита половина изображения бегущей лани, голова которой повёрнута назад, влево от нас [16]. Это, собственно, иероглиф, и значение его – «Смирна» («Город, половина которого именуется Смирной?»). На аверсе серебряной монеты Эфеса первой половины IV в. до н.э. вычеканена пчела (др.-греческ. **μέλισσα**) и буквы **ΕΦ**. На реверсе – финиковая пальма (др.-греческ. **φοῖνιξ** «(финиковая) пальма; финикийский») и половина изображения бегущего оленя с повёрнутой назад, влево от нас, головой [17]. Это два иероглифа, сочетание «(Наполовину?) финикийская Смирна», где слово «финикийская» – греческого происхождения, «Смирна» же, очевидно, – финикийского.

В семи с лишним десятках километров – или более чем в четырёхстах километрах морем – к северу от Эфеса, у Гермейского залива, лежал в то время ещё один город с названием «Смирна» [11, 592 (14:2)], который никогда не считался в письмен-

ной традиции финикийским. Наиболее раннее достоверное упоминание его – др.-греческ. **σμίρνα** – относится к концу VII в. до н.э. Из него следует, что к этому времени Смирна перешла в руки колофонских ионян и не была уже эолийской [9, 59 (1:149–150); 11, 592–594 (14:3–4)]. Согласно Страбону, «после отделения от эфесцев смирнейцы отправились... в ту местность, где теперь Смирна, которой владели лелеги. Вытеснив лелегов, они основали древнюю Смирну, почти в 20 стадиях от современной. Впоследствии под давлением эолийцев им пришлось искать убежища в Колофоне; затем они вернулись вместе с колофонцами и вновь захватили свой город» [11, 593–594 (14:4)].

Эта Смирна лежала в северо-восточном углу Гермейского залива на полуостровке между горами и морем. Она имела две гавани и со стороны суши была защищена стеной из сырцового кирпича и камня, возведённой около середины IX в. до н.э. В половине VIII в. до н.э. оборонительная линия Смирны была перестроена [18, 182–183] и обведена вокруг неё в виде кольца [19, 27]. Отмечается, что «градостроительная система этого уникального для Греции VIII в. [до н.э.] памятника – овальная планировочная структура, обнесённая по периметру оборонительными стенами, [была] близка планировке палестинских городов X и последующих веков». И что хотя «градостроительную структуру старой Смирны не обязательно считать заимствованной... тем не менее это не случайное сходство» [19, 216]. На рубеже VIII–VII вв. до н.э. оборонительная линия Смирны, как и вся она, была разрушена, после чего около века стен у неё, кажется, не было. С середины VII в. до н.э. в Смирне стала использоваться сетчатая планировка городского пространства, встречавшаяся уже на Востоке, но в греческих поселениях дотеле не применявшаяся. В VII в. до н.э. часть домов в этом городе была уже двух-трёхкомнатными, хотя обычно они состояли из одного помещения. В основном они были сложены из камня. Напомним, что каменное строительство в грече-

ском мире было к этому времени почти утрачено [18, 177, 221]. Население этого города-государства для поры, о которой идёт речь, оценивается в 1–2 тыс. горожан и жителей деревень, на порядок меньше, чем в Эфесе [19, 27; 18, 219].

Если не принимать объяснение основания Смирны, приводимое Страбоном, то её название могло бы объясняться расположением последней с левого борта для входивших в залив кораблей. И эти корабли, надо полагать, были финикийскими. Напомним, что во второй – третьей четверти IX в. до н.э. города-государства Финикии оказались в тяжёлом, хотя и не полном ещё, подчинении Ассирии. Во второй же половине VIII в. до н.э. этот порядок был заменён в них прямым правлением её администрации. Сказанное во многом объясняет причины того, почему во второй половине IX в. до н.э. вывод колоний из Финикии получил наибольший в истории её городов-государств размах и охват.

К концу IV в. до н.э. на юго-восточном берегу Гермейского залива был основан новый портовый город, названный тем же именем. Если стоять у конца залива, то новая Смирна лежала по левую руку, старая же, теперь оставленная, по правую, что было по-своему правильным, хотя внимания этому уделялось, очевидно, не более прежнего.

Считается, что «Илиада» и «Одиссея» были сложены во второй половине VIII в. до н.э., может быть, даже несколько позже, где-то в Ионии. Они написаны на ионийском диалекте древнегреческого языка, разбавленном эолийской его разновидностью. Согласно традиции, Гомер, сложивший их, скорее всего, был уроженцем Смирны и жил на Хиосе [20; 18, 123–124]. Вопросом же, в котором сходятся темы Гомера, Смирны и этой работы, является проблема Схерии (др.-греческ. **σχερίη**), о которой повествуется в «Одиссее».

Это было место «от народов других в стороне, на последних пределах шумного моря» [21, 165 (6:204–205)], земля феаков (др.-греческ. **φαίηκες**) и последняя остановка Одиссея перед возвращением на родную Итаку. В Схерии у фе-

аков был окружённый стенами город с двумя гаванями [22, 68, 74, 77 (6:9,262–265; 7:43–45)]. Когда-то они жили в другой стране, недалеко от циклопов, которые постоянно их грабили, и это вынудило их переселиться в Схерию [22, 68 (6:4–8)]. Жизнь феаков описывается в «Одиссее» как большей частью связанная с морем [22, 74, 77–78, 89–90 (6:263–272; 7:34–36,108–109; 8:191–192,246–247,252–253)]. (Хотя этот с головы до ног морской народ, кажется, не имел отношения к морской торговле [22, 88–90, 94 (8:158–166,178,238,396–398)].) Покровителем их был верховный бог морей Посейдон [22, 74, 77 (6:266; 7:34–35,54–71)], которого считали своим заступником и ионийцы. Жили феаки замкнуто [22, 72, 77 (6:204–205; 7:32–34)], но не то, чтобы бедно. О последнем свидетельствует и описание великолепия их царского дворца, напоминающего ближневосточные. Как и в Финикии, в земле феаков выделялись превосходные ткани, в том числе пурпурные [22, 69, 75, 78, 87, 155 (6:52–53,305–307; 7:103–110; 8:83–84; 13:134–136)]. Когда феаки доставляют Одиссея с подаренными ему дорогими дарами на Итаку, он в своих видах говорит, что привезли его сюда финикийцы [22, 158 (13:272–285)]. Однако феаки в «Одиссее» всё-таки не финикийцы, скорее же – эллины.

С античного времени Схерию большей частью отождествляют с Керкирой. Но последняя – вопреки тому, что говорится о Схерии в «Одиссее» [22, 76, 99 (7:24–25; 9:16–26)], – равно как и Итака, является одним из Ионических островов. И в «Одиссее» Схерия не называется островом [18, 127]. Этимологически название этого города-государства может иметь значение «(лежащий по) левую сторону». Ср.: испанск. **izquierda** «левая рука, левая сторона, левый»; литовск. **kairė** «левая рука, левая сторона»; окситанск. **esquèr** «левый»; португальск. **esquerdo** «левый». Тж.: баскск. **ezker** «левая рука, левый». И др.-греческ. **σκαίός** «левый»; латинск. **scaevus** «левый»; фракийск. **skaivas** «левый», при праиндоевропейск.

***skaiwós** «левый». Всё это может свидетельствовать в пользу того, что Гомер действительно имел отношение к Смирне, а последняя – к Схерии, выведенной гекзаметрами «Одиссеи».

Центральный город Согдианы, к последней четверти IV в. до н.э. перешедший в руки македонян, в античной историографии назывался Маракандами (др.-греческ. **μαράκανδα** и **μαρακάδαρτα**; латинск. **maracanda**). (Ср.: др.-греческ. (**σ**) **μάραγδος** «смарагд» или (**σ**) **μικρός** «небольшой».) Окружённый стенами из сырцового кирпича, внешней и внутренней, защищавшей акрополь, этот город сложился на левобережной, приподнятой над рекою равнине в середине VII в. до н.э. – середине VI в. до н.э. [23]. Согласно средневековой самаркандской традиции, исходным его названием было **šamarkat** [24, 110]. В начале IV в. согдийским обозначением этого города было **sm'rkndh** [24, 13] (согдийск. **knđh** «город» [24, 17, 88]; фарси **кәнд** «селение» и **кәндәр** «город»). К IX в. исламское название Самарканда – **samarqand** – на среднеперсидском, на котором уже во многом в этом городе говорили [24, 248], выглядело как **s(w)mlknd** [24, 12, 93]. Но писали его на этом языке и как **smarkand** [24, 110].

С XVII в. руины исторического Самарканда назывались Афрасиабом (таджикск. **афросиёб**; узбекск. **afrosiyob**). Как, в общем, и в нынешнее время, город и прежде лежал на левом – южном – берегу реки Зеравшан. С севера и востока он был защищён речными обрывами, с юга и запада – оврагами. В настоящее время южный рукав этой реки, проходящий в пределах города, обозначается как Карадарья (узбекск. **qoradaryo** «чёрная река», при таджикск. **дарё** «река»). Топоним же «Афрасиаб» обыкновенно рассматривается как искажение персидского **пәрсийаб**, имеющего значение «над чёрной рекой» (**фәраз** «над», **сийаһ** «чёрный, тёмный», **аб** «вода»). Сиабом (таджикск. **сиёб**; узбекск. **siyob**) именуется и небольшая речка, протекающая через город и впадающая в Карадарью. Таким образом, перевод

названия Самарканда как «города на левом (берегу)» получает, в сущности, полуподтверждение и с этой стороны.

В исходном – ивритоязычном – варианте, послужившем основой библейской «Книги Есфири», составленном около II в. до н.э., говорится, что к середине V в. до н.э. общины евреев-иудеев имелись во всех областях Ахеменидской империи, в том числе и в среднеазиатских [25]. При том, что до средних веков земли вокруг Самарканда были территорией, на которой говорили на индоевропейских языках, отстоявшей от земель, в которых для этого использовалась семитская речь, на тысячи километров. И как следует из приводимых ниже материалов, потамоним, означающий «чёрная или тёмная (река)», мог передаваться и основой индоевропейского происхождения, фонетически близкой первой основе в названии этого города.

Что касается второй компоненты астионима «Шамаркат», то его значением, очевидно, было «защищённое и постоянное поселение». Эта семантика, на наш взгляд, присутствует уже в названии столицы царства Аккад, одноимённого города, известного с XXIV в. до н.э. (шумерск. **agade**; аккадск. **akkade**). Ср.: аккадск. **kādu** «укреплённое место»; египетск. **H(w).t** «большой дом, город»; итальянск. **sotto l'egida** «под защитой», при борейск. **KVTV** «дом, селение» и т.д. То же самое, вероятно, с семантикой второй части топонима «Маракадарта» (праафразийск. ***hutar** «укреплённое место»; пракельтск. ***katrinx** «укреплённое место» и т.д.).

Самур (азербайджанск. **samurçay**; лезгинск. **самур**; рутульск. **самыр**; цахурск. **самур**) – одна из средних рек Восточного Кавказа, характеризующегося как зона очень высокой непрозрачности протекающих здесь водотоков. Последнее во многом объясняется наличием в их бассейнах размываемых горных пород, таких как сланцы, известняки, песчаники, глины. Самур входит в тройку рек, считающихся самыми мутными в России. (Две другие – Аксай и Сунжа – также относятся

к рекам Восточного Кавказа.) [26, 171, 175, 177, 178, 333, 334]. Средняя мутность Самура по разным оценкам составляет 1950 г/м³ – 3250 г/м³. Наибольшая – 110000 г/м³. Среднегодовая непрозрачность его воды возрастает вниз по течению реки, равняясь 1400 г/м³ у с. Лучек, 2060 г/м³ – у с. Ахты и 4880 г/м³ – у с. Зухул [27]. Весной и летом эта горная река полноводна, и летом вода в ней до крайности мутна, хотя зимою – чиста и прозрачна.

Ср.: др.-армянск. **samoyr** «соболь» (окраска которого варьирует от жёлто- до чёрно-коричневой); готск. **smarna** «навоз»; ср.-греческ. **σαμούριον** «соболь»; курманджи **çamûrê** «глинистый, грязный», **semûr** «соболь»; латышск. **smērēt** и **smulēt** «пачкать»; немецк. **schmierig** «грязный, липкий»; нидерландск. **smurrie** «грязь, ил»; и.-осетинск. **цъымара** «болото»; ср.-персидск. **smwl** «соболь»; румынск. **smârc** «болото»; русск. **измаранный** «испачканный», **смурый** «тёмно-серый»; санскрит **samala** «грязный», **ṣyāmala** «тёмн(оцветн)ый»; фарси **äsmär** «смуглый»; хорватск. **zamrljan** «грязный, непрозрачный»; при праславянск. **šomorkъ** «сумерки, полумрак». Тж.: арабск. **sammûr** «соболь»; грузинск. **samuri** «соболь»; марийск. **шемалге** «темноватый»; турецк. **çamurlu** «грязный, мутный», **esmer** «смуглый»; чувашск. **сёмлен** «темнеть».

Материал этой выборки даёт основание полагать, что семантика древнеславянского термина **смръдь** «простолюдин, смерд» была связана с тем, что люди, которые им обозначались, были заняты чёрными (несвободно-крестьянскими) работами, и поэтому и по другим причинам считались в господствующих общественных кругах грязными и дурно пахнущими, худшими, зависимыми людьми. Ср.: марийск. **шемер** «трудящийся». >

Таким образом, название реки Самур имеет индоевропейское происхождение и значение «тёмная, непрозрачная». Один из её притоков, протекающий близ границы с Азербайджаном, называется Кара-Самуром (др.-тюркск. **qara** «чёр-

ный, тёмный»). В половодье его вода окрашена в серый цвет. Будучи топонимической билингвой, это обозначение служит ещё одним подтверждением правильности подобного объяснения семантики второй его составляющей.

Среди лезгин эта протекающая через их земли река с давних пор известна также как Кулан (лезгинск. **къулан вацI**), «срединная». Возможно, однако, что этот эндоним связан с её названием на индоевропейском же языке с близким к Самуру значением. Ср.: др.-греческ. **κελαινός** «чёрный, тёмный»; микенск. **kerano** «чёрный»; др.-нидерландск. **klene** «пачкать»; д.-осетинск. **къеллон** «испачканный, грязный», **къеллон-меллон** «мутный, грязный»; словенск. **kalen** «мутный, грязный»; чешск. **kalný** «мутный, пасмурный». И др.-греческ. **γλίμη** «грязь, ил»; литовск. **gléinė** «влажная глина»; немецк. **grundig** «тинистый, топкий»; нидерландск. **grondig** «мутный»; русск. **глинистый** «содержащий глину, серо-коричневый». На Каспии **голыню** по-русски называют и отмель, оголяющуюся при сходе воды. Тж.: турецк. **karanlık** «тёмный»; финск. **kurainen** «грязный, слякотный».

Последняя подборка объясняет и семантику упоминаемого Плинием обозначения устья Рейна и Мааса, в его «Естественной истории» называемого Гелинием (латинск. **helinius** [28; 29; 30]; ср.: литовск. **klanas** «лужа» и **klonis** «низменность»; хеттск. **hallanni** «разравнивать»), то есть «низменным, грязным». В конце античности – начале средневековья здесь было множество островов, морских и речных рукавов, и эти места с их прибрежными песчаными дюнами, приливо-отливными глинистыми низинами и обширными торфяными болотами два раза в сутки затоплялись морем, что и делало их топкими и грязными.

С начала XII в. эти территории назывались Холлантом (ср.-нидерландск. **hollant**) или Холландией (ср.-нидерландск. **hollandie**). С того же времени жителей этих мест вне их именовали голландцами (латинск. **hollandi**). Топоним «Гол-

ландия» (нидерландск. **holland**), к этим именам собственным и возводимый, объясняется ныне как сочетание нидерландск. **hol** «низко расположенный, топкий» и **land** «земля» [31].

В Англии Холландом (английск. **holland**; при **holl** «низинный, низменный») называется юго-восточная часть Линкольншира, расположенная у залива Уош (английск. **the wash**; по-видимому, от др.-английск. **wāse** «вязкая грязь» и французск. **vasière** «илистая отмель»). Топоним «Холланд» в форме «Хойланд» (латинск. **hoiland**; при др.-греческ. **κοῖλο-** «низко лежащий» и **κοῖλον** «низина») известен с конца XI в. [32]. Тогда это была болотистая и низменная равнина, расположенная почти на уровне моря. Эти места считаются областью наиболее низко лежащих земель в Великобритании.

В «Песни о Нибелунгах» (конец XII – начало XIII в.) территория между низовьями Мааса и Рейна называется Нидерландом (ср.-в.-немецк. **niderlant**; **nider** «низкий» и **lant** «земля») [33]. С XV в. Голландия начинает обозначаться также теми же словами, что и другие «Низкие земли» – **de laghe landen** (ср.-нидерландск. **laghe** «низкий»), – семантика которых повторяла семантику имени собственного «Нидерланды». И названия эти не были случайными. Так, в настоящее время до половины территории Нидерландов (нидерландск. **nederland**; **neder** «низкий») лишь менее чем на метр приподнято над уровнем моря, а около четверти этой страны находится ниже его.

Таким образом, можно утверждать, что название Голландии в фонетическом и в семантическом отношениях близко к названию Гелиния,

с одной стороны, и семантически близко к наименованию Нидерландов и калькам с последнего со значением «низкая земля» или «низкие земли» в германских, кельтских и романских языках (английск. **the low lands**; валлийск. **y gwledydd isel**; французск. **les pays-bas** и т.д.) – с другой. Но если имени собственному «Гелиний» была присуща отрицательная коннотация «грязный», то «Голландия» имела значение скорее «низко лежащей», чем «топкой», «Нидерланды» же – тем более и только «низинных».

Прибрежные континентальные территории, называвшиеся «Низкими землями» и на северо-востоке доходившие до Эльбы, на юго-западе начинались от Соммы (французск. **somme**). Это одна из средних рек Франции. Наиболее ранним известным её названием было «Самара» (латинск. **samara**; середина I в. до н.э. – середина VII в.н.э.) [34]. Русло Соммы устлано торфяной постелью, уходящей под неё на глубину от нескольких до нескольких десятков метров. Торфяники этой реки тянутся вдоль неё на протяжении двухсот километров и являются одними из самых значительных во Франции [35]. В этих местах расположены два обширных комплекса водно-болотных угодий, находящихся под международной защитой. Торфяники, которыми протекает Сомма, окрашивают её воды, остающиеся чистыми, однако же, в тёмный цвет [36; 37; 38]. Это и объясняет её прежнее (подборка раздела о Самуре) и нынешнее (ср.: французск. **sombre** «тёмный»; нидерландск. **somber**) названия, имеющие индоевропейское происхождение и значение «тёмная (река)».

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KENNEDY'S FOREIGN POLICY IN VIETNAM: A SERIES OF DECISIONS THAT ULTIMATELY LIMITED DIPLOMATIC OPTIONS

Abstract. John F. Kennedy's political rhetoric, unwavering support for aid-packages and military equipment, and his lack of reliable local partnership in the South Vietnamese government restricted possible diplomatic options in the escalation of the Vietnam War.

Keywords: Kennedy, Vietnam War, diplomacy, 1960 s, communism, democracy.

"We fight because we must fight if we are to live in a world where every country can shape its own destiny. And only in such a world will our own freedom be finally secure." –Lyndon B. Johnson [5].

By the 1950s, the tension between the United States and the Soviet Bloc had deepened. Around the world, the ideological differences between Communism and Western democracy incited conflicts and power struggles through proxy fights. These proxy wars, including the Paraguayan Civil War, Korean War, and Algerian War, heightened the global tension and forced regional countries to align themselves with either the Soviet Union or the United States. This intensification of international frictions promoted the necessity for a novel American foreign policy to defeat the Soviet Regime. Kennedy's previous failure to impede Soviet presence in the Bay of Pigs Invasion and the Cuban Missile Crisis further augmented the strategic significance of Vietnam. His political rhetoric, unwavering support for aid-packages and military equipment, and his lack of reliable local partnership in the South Vietnamese government restricted possible diplomatic options.

John F. Kennedy: Ideology and Personal Image Before Presidency

Kennedy presented himself as a pragmatic idealist. Ideologically, he fell into the liberal wing of the Senate democrats. Kennedy consistently believed in the containment of communism [7]. In his mind, communism was a significant threat to Western so-

cieties. Although his record as a domestic lawmaker was hardly impressive, Kennedy was invested in foreign policy [14]. As a United States Senator, he repeatedly criticized the foreign policy of his predecessor, General Eisenhower, for being too passive in maintaining the balance of power [20]. Even before Kennedy ran for president, he regarded Vietnam as a significant and necessary political conflict with communism. In an address at the Vietnam Luncheon in 1956, Kennedy further developed his diplomatic theory of Vietnam [8]. He compared the American diplomatic policy in the world at the time as a "volunteer fire department." As he noted, a fire department "rarely prevents fires" [8]. As the metaphor makes clear, Kennedy hoped to go on the offensive against the Soviet Union. He saw communism as a long-term adversary and was determined to constrain it more ardently than his predecessor. Kennedy was willing to sacrifice significantly for a worthy gain.

He later expounded the infamous domino theory, according to which, Vietnam represented "the cornerstone of the Free World in Southeast Asia, the keystone to the arch, the finger in the dike." If, according to this theory, the "Red Tide of communism overflowed into Vietnam," the region would succumb to Soviet interest. Therefore, he concluded, "America's stake in Vietnam, in her strength and in her security, is a very selfish one" [8]. This domino theory indicated that the downfall of Vietnam would lead many others to be exposed to Communism. Though lacking any

concrete evidence, his general proposition received the attention and support from the general public and congressional hardliners. His domino theory largely influenced the direction of American diplomacy on communism; the policy shifted from managing communism as an adversary to pursuing the containment of communism internationally.

Before Vietnam: Bay of Pigs and Cuban Missile Crisis

Kennedy encountered multiple diplomatic challenges, including the Pigs of Bay and the Cuban Missile Crisis. These two political predicaments further restricted Kennedy's strategic imperative and inflated the gravity of Vietnam.

The Bay of Pigs, an operation under Kennedy intended to overthrow the Cuban government in 1961, failed disastrously and became a public humiliation for the Kennedy administration. During this event, Kennedy exposed his inability to conduct inter-agency cooperation and his negligence in incorporating U.S Allies in decision making [25]. His boldness diminished the moral superiority and legal structure of the United States [25, 315]. Though the Bay of Pigs was programmed by the CIA in the Eisenhower Administration, Kennedy's lack of follow through and his lack of familiarity with government structure contributed to the ultimate failure of this mission [25, 314]. Kennedy himself did not question the plan of invasion; his cabinet, including the State Department, Joint Chiefs of Staff, and Secretary of Defense raised no objection to this plan. Inadequate debate regarding the Bay of Pigs essentially led to the failure of the mission. The plan underestimated Castro's power and alienated an historical ally of the United States. Castro consolidated his power further and communism prevailed over democracy in Cuba. The strategic blunder inadvertently promoted the growth of communism in Cuba.

The consequence of the previous political intervention emerged during the Cuban Missile Crisis. Essentially, the Soviets exploited Kennedy's recklessness in the Bay of Pigs. Following the alienation of the Cuban

government, Khrushchev was able to reach an agreement with Castro to implement Soviet missiles as an effective deterrent to the United States [16]. Kennedy was therefore partially responsible for the commencement of the Cuban Missile Crisis. Moreover, Kennedy dealt with the Cuban Missile Crisis dubiously. He misunderstood Khrushchev's military intention. Kennedy thought Khrushchev's missile deployment in Cuba was an act of probing created by personal contempt [24]. However, Khrushchev's actual intention was to restrict the possibility of an American solicited missile attack on the Soviet Union and balance the strength of American missiles [22]. Furthermore, in a highly fluid situation, during which any miscommunication could possibly have led to nuclear warfare, Kennedy chose to backchannel the Soviets. Kennedy elected secret dealings for political purposes and misled the American public into believing that such a crisis could be managed [24]. Though the Cuban Missile Crisis is considered a significant success of the Kennedy Administration, the crisis could have been prevented or mitigated through direct foreign protocols. Nevertheless, the apparent threat in the Cuban Missile Crisis impugned Kennedy's political image and the safety of the American public. The threatening signals from communism forced Kennedy to contest and eradicate communism even further.

Both incidents proved the Soviet Union a valiant opponent on the global stage; the Cuban Missile Crisis and Bay of Pigs revealed immense Soviet influence globally. Kennedy's previous dealings with the Soviet Union failed to protect the prestige of the American government. Hence, Kennedy elevated the significance of Vietnam and converted Vietnam into another front to challenge the spread of communism.

Vietnam: An Oppressive History of Colonial Rule

Due to immense opposition to the colonial rule of the French government, a potent insurgency arose in the 1950s. In this period, the Soviet Union sought to challenge the United States globally, both ideologically and geo-politically. Many states neigh-

boring Vietnam, such as China, fell into the Soviet bloc [21]. This continuing surrender of influence in Indo-China worried many in Washington; widespread McCarthyism, for example, symbolized the increasing anxiety of U.S. policymakers regarding the loss of influence in Asian areas [19]. Eventually, the United States bolstered the position of the French government, not to suppress the Vietnamese people, but to engage the Soviet Union firmly in a geopolitical scenario. This insurgency, namely the Viet Minh (then Viet Cong), was led by Ho Chi Minh, a known communist operative. The rising of communism in North Vietnam raised grave concerns for the American government; many viewed the Viet Minh or Viet Cong as a geopolitical success for the Soviet bloc [4]. In 1955, the Geneva Conference eventually divided Vietnam in two. The north was largely controlled by communism. In the south, the American government bolstered the existing government to halt the spread of communism [27]. Even though Vietnam was geologically divided, nationalist sentiment was prevalent. The South Vietnamese people eventually chose Ngo Dinh Diem as their leader. He repudiated communism and colonialism [28]. On the other hand, Ho Chi Minh communized and indoctrinated the north, fabricating a communist state [28].

Expansion of Vietnam Involvement

In 1961, when Kennedy became President, he firmly endorsed Ngo Dinh Diem, the President of South Vietnam. Diem, himself a devoted Catholic, seemed to be an ideal figure to propagate a new democracy and to defeat the dissemination of communism. Though Diem was reluctant to have U.S. combat troops in South Vietnam, he requested more financial aid, increased military advisors, and more equipment for his increasing troops [6, 251]. Later that year, General Taylor, Chairman of the Joint Chiefs of Staff, facilitated the process and suggested that the President ought to commit eight thousand combat troops to South Vietnam, disguised as logistic legions [6, 252]. McNamara, the Secretary of Defense, and the Joint Chiefs of Staff denied General Taylor's suggestion, critiquing his plan

as inadequate. The concerns of the Pentagon turned out to be purely logistical; they believed stationing some 200,000 men was reasonable to combat Northern Vietnamese forces [6, 253]. The assessment of the Pentagon indicated rather strenuous warfare. Kennedy pushed back; he concurred with approving aid but rejected positioning of combat troops due to his fear of escalating war in Vietnam [6]. Nevertheless, Kennedy wanted to protect the prestige of the American government and to triumph in the Vietnam efforts. The United States committed over 2.1 billion dollars in economic assistance, not including the cost of increasing military advisors [18]. The commitment of military weapons and aid-packages further confined Kennedy into direct involvement in Vietnam.

Ironically, although Kennedy seemed to show restraint in exercising his power, he set the tone for the Vietnam War. Politically, the Kennedy administration retained its message of diminishing communism. In the case of Vietnam, Kennedy's rhetoric was somewhat unpragmatic, even concerning. His ideological statements eventually made his policy imperative rather than malleable [15]. His stances, often fused with emotional arguments on moral righteousness of bolstering South Vietnam, made it difficult for him to avoid war. The cabinet pressed Kennedy's messaging even further. Many high-level officials, such as McNamara, General Taylor, and Vice President Johnson, visited South Vietnam as a way of signaling U.S. support. Johnson even went as far as praising Diem as the reincarnation of Winston Churchill in 1961. Robert Kennedy, the Attorney General, declared in 1962 that "we are going to win" [6]. Politically, had Kennedy shift his position on Vietnam, he would have devastated his domestic support. Many media supported the Kennedy oratory. One *New York Times* article in 1962 was even subtitled "American Prestige Is Staked on Keeping Communism from Taking Over in a Critical Area Where Battle Is Complex and Difficult" [1]. His polling data revealed the effectiveness of his messaging; Kennedy had an unprecedentedly high approval rating, averaging about 70% [17]. His political

rhetoric might have restricted other possibilities and strategic moves.

In addition to his awkward political stances, Kennedy lacked a reliable partner in South Vietnam. Though Kennedy bolstered Diem publicly, Diem was not a firm supporter of American policies. He often refused to carry out reforms or suggestions from the United States. Also, Diem's reputation and popularity gradually declined as he demonstrated an inability to administer or reform South Vietnam. His military forces were highly corrupt; officers who expressed loyalty to Diem received higher commissions and postings, regardless of their ability. In the Al Cupac campaign of 1963, South Vietnamese forces were unable to combat the Vietcong, even with the assistance of American advisors [6]. His administration constituted a similar level of corruption; Diem openly favored privileged Catholic candidates loyalist for domestic office. Diem also made no efforts toward economic, social, or political reform [20]. As time progressed, Diem established an ineffective administration to counter North Vietnam [20]. Furthermore, Diem's priority was to ensure his authority in South Vietnam. The South Vietnamese forces fought only for the interest of Diem, not the interest of combating the communists. Diem essentially let the Americans engage in heavy warfare, keeping the rest of his forces to conserve his power and authority [6]. Further, Diem's public reputation diminished in 1963 due to the continuing suppression of Buddhism by his military forces. Prominent Buddhist leaders and others who detested his policies openly protested against Diem [6, 259]. Declining public support concerned the administration gravely. The possibility of a coup was discussed in the Kennedy Administration. The cabinet was divided over this strategic possibility. General Taylor, Vice President Johnson, John McCone (CIA Director), and Secretary McNamara believed Diem was the only viable option [6, 279]. McNamara also mentioned that he was unaware of any replacements [10]. On the other hand, Governor Harriman, Hillsman, and Amba-

sador Lodge (Ambassador to Vietnam) considered a coup necessary to mediate the Vietnam situation. Harriman expressed his concerns over Diem's inability to carry out American policies [10, 64]. Ambassador Lodge conveyed that Diem was unwilling to follow Kennedy's instructions [6, 288–289]. The Ambassador believed that no further efforts could be made in Vietnam with Diem. As he noted, "war cannot be won under a Diem Administration" [6, 289]. Eventually, the US government consented to a coup, agreeing not to interfere with it on Diem's behalf. General Minh, who served under Diem, overthrew, and assassinated Diem, leaving the circumstance in South Vietnam even more unpredictable [6, 311].

Other episodes revealed Kennedy's reluctance. It appeared that Kennedy had not made up his mind on war; he even sanctioned or acknowledged a formal strategic exploration on the withdrawal of the U.S. military in Vietnam in 1965 [9]. However, Kennedy elaborated his concerns over cutting troop levels if the military situation in Vietnam worsened [26]. Furthermore, the memorandum only concretely withdrew a thousand U.S. troops, a drop in the bucket compared to sixteen thousandths deployed [23]. The memorandum could simply be a political strategy to deal with political repercussions. Kennedy further elaborated on his concerns about the Vietnam challenge in an interview in 1963: "We can't expect these countries to do everything the way we want them to do. They have their own interests, their own personalities, their own tradition. We can't make everyone want to go in our image. In addition, we have ancient struggles between countries. . . . We can't make the world over, but we can influence the world" [13]. Though Kennedy had appeared adamant in support of combating the expansion of communism, he stressed his concerns over the deployment of military means as an ultimate resolve on the Vietnam issue.

Nevertheless, the enlargement of military presence and aid packages, Kennedy's resolute elocution

on Vietnam, and lack of local partnership in South Vietnamese government boxed him into a difficult predicament to deliberate between success and reasonable efforts in Vietnam.

Conclusion:

In the final analysis, the failure to safeguard the prestige of the American government during the Cuban Missile Crisis and Bay of Pigs induced a greater strategic magnitude in Vietnam. Fundamentally, Kennedy utilized Vietnam as another front to challenge the spread of communism. In the end, the inadequacy of regional partnerships between South Vietnam and the U.S government, Kennedy's substantial commitment of U.S equipment and military advisors, as well as his political rhetoric further contributed to the strategic limitations in the prospect of Vietnam.

Appendix A



Figure 1.

Thich Quang Duc, a prominent Buddhist who chose self-immolation to protest the repressive policy of the Diem Administration. This extreme behavior revealed the aversion toward the Diem regime.

“Self-immolation of Buddhist monk Thich Quang Duc in protest during the Vietnam

War.” *Encyclopaedia Britannica Online*. <https://www.britannica.com/event/Vietnam-War/The-conflict-deepens#/media/1/628478/244365>.

In 1963, President Kennedy met with Gen. Taylor and Secretary McNamara to discuss the Vietnam issue in the Oval Office.

In 1963, President Kennedy met with Gen. Taylor and Secretary McNamara to discuss the Vietnam issue in the Oval Office.

Appendix B



Figure 2.

“MEETING WITH SECRETARY OF DEFENSE ROBERT S. MCNAMARA, and GEN. MAXWELL D. TAYLOR, CHAIRMAN, JOINT CHIEFS OF STAFF (JCS), 11:00AM,” *John F. Kennedy Presidential Library*, accessed March 1, 2022. URL: <https://www.jfklibrary.org/assetviewer/archives/JFKWHP/1963/Month%2010/Day%2002/JFKWHP-1963-10-02-C>.



Figure 3.

In 1961, Vice President Lyndon B Johnson met with South Vietnamese President Ngo Dinh Diem at Independence Palace, Saigon. Lyndon B Johnson supported Diem adamantly and praised Diem as the reincarnation of Sir Winston Churchill.

Breen, Tom. "Johnson and Diem." *UConn Today*. Last modified May 4, 2020. Accessed February 25, 2022. <https://today.uconn.edu/2020/05/uconn-historian-south-vietnam-archives-provide-new-insights-war/johnson-diem/#>

Appendix C-1



Figure 4.

In January 1966, women and children hid in a muddy stream to escape fierce Viet Cong fire at Bao Trai, 20 miles from Saigon. The living conditions for women and children were horrifying.

Horst Faas, "35 years after the fall: The Vietnam War in pictures," *National Broadcasting Company*, last modified April 29, 2010, accessed March 1,

2022. URL: <https://www.nbcnews.com/slideshow/news/35-years-after-the-fall-the-vietnam-war-in-pictures-36859810>

Appendix C-2



Figure 5.

An American soldier endeavoring to protect Vietnamese civilians by transporting them elsewhere.

George C. Herring, "How Not to 'Win Hearts and Minds,'" *New York Times*, last modified September 19, 2017, accessed March 1, 2022. URL: <https://www.nytimes.com/2017/09/19/opinion/vietnam-war-americans-culture.html>

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2. Breen, Tom. "Johnson and Diem." *UConn Today*. Last modified May 4, 2020. Accessed February 25, 2022. URL: <https://today.uconn.edu/2020/05/uconn-historian-south-vietnam-archives-provide-new-insights-war/johnson-diem/#>. Vice President Johnson met with Diem in his palace. He even praised Diem as the reincarnation of Sir Winston Churchill.
3. Faas, Horst. "35 years after the fall: The Vietnam War in pictures." *National Broadcasting Company*. Last modified April 29, 2010. Accessed March 1, 2022. URL: <https://www.nbcnews.com/slideshow/news/35-years-after-the-fall-the-vietnam-war-in-pictures-36859810>. This picture shows the difficulty and hardship of war. Women were forced to stay in a muddy canal to escape fierce fire from the Viet Cong.

4. Herring, George C. "How Not to 'Win Hearts and Minds.'" *New York Times*. Last modified September 19, 2017. Accessed March 1, 2022. URL: <https://www.nytimes.com/2017/09/19/opinion/vietnam-war-americans-culture.html>. This picture shows an American soldier rescuing a woman and her children.
5. Johnson, Lyndon B. "Address at Johns Hopkins University: 'Peace Without Conquest.'" The American Presidency Project. Accessed March 4, 2022. URL: <https://www.presidency.ucsb.edu/documents/address-johns-hopkins-university-peace-without-conquest>. President Johnson expresses his personal view on Vietnam to students at Johns Hopkins University. He believes that Americans have a national responsibility to help the South Vietnamese to protect their democracy and home. Johnson utilizes his rhetoric to try and persuade the American public that the Vietnam War is necessary and worthy.
6. Karnow, Stanley. *Vietnam: A History*. New York: Viking Press, 1984. Karnow offers an historical insight into the beginning and progression of Vietnam through a journalist's perspective. Karnow includes substantial details regarding the discussion of diplomatic decisions by high level officials as well as how the Vietnam War unfolds locally in Vietnam. Karnow reveals the thinking of the Kennedy Administration on Vietnam policy as well as the common distrust of the South Vietnamese people toward the Diem Administration.
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9. McGeorge, Bundy. "National Security Action Memoranda [NSAM]: NSAM 263, South Vietnam." John F. Kennedy Presidential Library and Museum. Last modified October 11, 1963. Accessed March 4, 2022. URL: <https://www.jfklibrary.org/asset-viewer/archives/JFKNSF/342/JFKNSF-342-007>. National Security Action Memorandum 263 formally authorizes the withdrawal of 1000 U.S troops in Vietnam. This memorandum does reflect on a level of President Kennedy's reservation about a full-scale war.
10. McNamara, Robert S. *In Retrospect: The Tragedy and Lessons of Vietnam* (Vintage). N.p.: Vintage, 1996. Secretary of Defense (1961–1968) McNamara contemplates the reasons why the United States failed in Vietnam. His accounts include vivid discussion between President Kennedy, Gov. Harriman, Secretary of State Dean Rusk and others on the subject of Vietnam policy. His personal account even consists of the discussion on whether to sanction the coup of Diem in 1963.
11. "MEETING WITH SECRETARY OF DEFENSE ROBERT S. MCNAMARA, and GEN. MAXWELL D. TAYLOR, CHAIRMAN, JOINT CHIEFS OF STAFF (JCS), 11:00AM." John F. Kennedy Presidential Library. Accessed March 1, 2022. URL: <https://www.jfklibrary.org/asset-viewer/archives/JFKWHP/1963/Month%2010/Day%2002/JFKWHP-1963-10-02-C>. President Kennedy meets with Gen. Taylor and Secretary McNamara to discuss the Vietnam conflict and future vision of policy during a meeting.

12. "Self-immolation of Buddhist monk Thich Quang Duc in protest during the Vietnam War." Encyclopaedia Britannica Online. URL: <https://www.britannica.com/event/Vietnam-War/The-conflict-deepens#/media/1/628478/244365>. A Vietnamese monk self-immolates to protest the repressive Diem government. This shows the unpopularity of the Diem Administration among the public.
13. "TRANSCRIPT OF NBC BROADCAST WITH CHET HUNTLEY, 9 SEPTEMBER 1963." John F. Kennedy Presidential Library and Museum. URL: <https://www.jfklibrary.org/asset-viewer/archives/JFKPOF/046/JFKPOF-046-032>. Kennedy expresses his concern over the interview with Huntley. He still believes that the Vietnam War is fundamentally the war of South Vietnamese people, not the American people. Though he is restrained in sending in the U.S military, he considers a certain magnitude of intervention necessary.
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THE ROYAL ARMY OF FRANCE AND SOCIAL INEQUALITY IN THE AGE OF PHILIP II AUGUSTUS (1180–1223)

Abstract. The article is devoted to the study of the royal army of France and the social inequality in it during the reign of Philip II Augustus (1180–1223). Based on the analysis of synchronous sources, comparison of data on the economic situation and moral and ethical perception, the differences between the categories of the army structure are reconstructed. The policy of collecting lands and strengthening the royal power by Philip II Augustus led to a change in relations towards the tendency of uniting people of various class groups. The changes also affected the military forces, which are a reflection of the structure of society, “society in miniature”. At the same time, remaining within the framework of the feudal structure, the French Kingdom followed an unconventional path of development of feudalism towards the integrity and consolidation of vassal duties on the person of the king. Thus, despite the existing social inequality, the new approach made it possible to lay the foundations for overcoming unequal status in society, and also formed a “triad of unification” tied to a single religion, language and royal power.

Keywords: inequality, military history, feudal army, France, Middle Ages.

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КОРОЛЕВСКАЯ АРМИЯ ФРАНЦИИ И СОЦИАЛЬНОЕ НЕРАВЕНСТВО В ЭПОХУ ФИЛИППА II АВГУСТА (1180-1223 ГГ)

Аннотация. Статья посвящена изучению королевской армии Франции и социальному неравенству в ней в эпоху правления Филиппа II Августа (1180–1223 гг.). На основе анализа синхронных источников, сопоставления данных об экономическом положении и нравственно-этическом восприятии реконструированы различия между категориями армейской структуры. Политика собирания земель и укрепления королевской власти Филиппом II Августом привела к изменению отношений в сторону тенденции объединения людей различных сословных групп. Изменения затронули и военные силы, являющиеся отражением устройства общества, «обществом в миниатюре». В то же самое время, оставаясь в рамках феодальной структуры Французское королевство пошло по нетрадиционному пути развития феодализма в сторону целостности и закрепления вассальных обязанностей на персоне короля. Таким образом, не-

смотря на существующее социальное неравенство новый подход позволил заложить основы преодоления неравного положения в обществе, а также сформировал «триаду объединения», завязанную на единой религии, языке и королевской власти.

Ключевые слова: неравенство, военная история, феодальная армия, Франция, Средневековье.

Современные социологические науки сделали серьезный шаг в сторону исследования различных форм и видов общественного неравенства. Основополагающие теории, структурно-функциональная и конфликтологическая, по-разному смотрят на истоки социальных различий и двигающие факторы (как продукт разделения труда и как экономическая дифференциация). Однако общим для этих теорий является рассмотрение сложившегося положения людей как некоей устоявшейся надстройки, созданной людьми, то есть искусственной. Таким образом обе теории выражают традиционное для времени зарождения социологии как науки (для XIX в.) материалистическое понимание мира. Следовательно, время, когда господствовало нематериалистическое понимание окружающего пространства зачастую оказывается обойдено социологическими исследованиями. Автор исходит из позиции, что отсутствие термина не говорит в общем об отсутствии явления, но исходит оно из иной специфики исторической действительности, окружающей конкретную эпоху. Попытки же унифицировать общественные отношения путем создания универсальной модели чаще всего являются искусственным упрощением истории и ведут к неверному результату. Поэтому столь любопытно исследовать отношения в обществе, принципиально отличающимся от известного науке-социологии – феодальном обществе Развитого средневековья.

Система феодальных общественных взаимоотношений приобрела законченный вид в эпохе Развитого Средневековья (XI–XIV вв.). Феодальная система в виде «лестницы» окончательно сформировалась; взаимовыгодные отношения общественного договора по принципу «сеньор-вассал» распространились на всех членов этого

общества: от крестьян, являющихся вассалами рыцаря, до короля, являющегося вассалом главного сеньора – Бога. Очень точно средневековый вассалитет характеризует латинский принцип «do ut des» («даю чтобы ты дал»), формирующий принцип взаимозависимости данной системы. То есть человек, проживающий в средневековом феодальном обществе «всегда чей-то человек», человек своего сеньора. И это наглядно демонстрирует всю идею общественных отношений. Средневековое общество – это неравное общество по своему определению, поскольку люди не могут быть равны перед друг другом. При этом люди равны перед Богом. Общество насковзь пропитано религиозным сознанием; это общество, где существующее мироположение устраивает всех членов этого общества, поскольку так создал Бог, а Бог в средневековье – это система обычаев, традиций, ценностей, кутюмов, регламентирующих миропостройство. Естественно, история являла собой случаи отхода от описанного «идеального» положения, но любое общество в любой исторический промежуток порождает маргинальный элемент, различных несогласных и недовольных. И само общество внутри себя начинает преследовать этих смутьянов. В общем, общество стремилось прийти к данному положению, и именно поэтому материалистический подход трудно применим к Средневековью. Важно сделать акцент, что формирование системы миропонимания проходило постепенно. В эпоху Развитого средневековья это формирование было завершено.

Период правления французского короля Филиппа II Августа является крайне нехарактерным для общеевропейской тенденции развития феодализма. Его видение кардинально отличалось от «коллег-королей»: Филипп концентрировал

в своих руках вассальные территории, требуя оммажа дипломатией или силой. Все это укрепляло королевскую власть, как бы возвышая её над другими землями и правителями. Традиционно оплотом любой феодальной власти являлась военная сила – армия. Между сбором территорий под своей рукой и увеличением численности армии имелась прямая зависимость.

Средневековое войско очень любопытно в своей структуре: оно относительно малочисленно, существует в определенное время (то есть собирается по вассальному праву на время похода), имеет различное материальное обеспечение. В нем отсутствует командование на тактическом уровне и практически нет дисциплины. Изучение вопросов армии средневековья крайне показательно, поскольку она являла собой все общество «в миниатюре». Вначале необходимо затронуть численность средневековых армий. Сведениями об армии короля Филиппа II Августа располагают два синхронных источника: «Список сержантов» («*Prisia servientum*», «*Prisie de Sergens*») и «Общий счет доходов короля за 1202 г.» («*Compte général des revenus du roi de 1202*») [1, 31]. По данным Общего счета доходов короля за 1202 г. в королевской армии числилось 257 рыцарей, принесших оммаж королю. К этому следует добавить феодальные контингенты, собиравшиеся в случае войны и составляющие в 1214 г. порядка 800–1000 рыцарей. Если сбор сержантов был относительно «простым» делом, то с рыцарями ситуация всегда обстояла более сложно. Феодальный принцип гласил помогать королю «всеми силами», однако на деле вассалы предоставляли лишь часть своих войск для службы. Так, Гийом Бретонец описывал конкретные случаи численного недобора рыцарей [3, 27]. Например, герцог Нормандский мог потребовать службы 581 рыцаря, однако королю Франции предоставил лишь треть. Герцогство Бретань из должных 166 рыцарей обеспечила королю лишь 40; графство Понтье вместо 60 рыцарей прислало 14 и т.д. [2, 95] Кроме того, добиться при-

хода даже этих ограниченных контингентов было сложной дипломатической задачей. Таким образом феодальная служба всегда носила случайный и недолговечный характер. Кроме рыцарских контингентов армия Французского королевства располагала отрядами пеших сержантов около 7695 человек; имелось также 267 конных сержантов, 86 конных арбалетчиков, 133 пеших арбалетчика, 300 рутьеров-наемников [3, 27].

Вопрос неравенства возникает при детальном рассмотрении военной структуры. Оно базируется на двух аспектах: экономический аспект различия, выраженный через жалование, различный срок и условия службы, и этический аспект различия, характеризующийся через высокомерное отношение одних лиц внутри армии к другим. Рассмотрим оба аспекта более подробно.

Первый (экономический) аспект относится к бытовым явлениям повседневной жизни. Солдаты в армию призывались на разных началах; так рыцарь, призванный по вассальному праву обязан служить королю за свой счет в течение сорока дней (в год) [3, 28]. Он сам обеспечивает свое снаряжение, своих коней, место для постоя. Он также самостоятельно снаряжает и обеспечивает своих слуг и свой отряд, численность которого варьируется от размеров собственного фьефа. После истечения срока рыцарь волен уехать со службы, поскольку свой долг королю он исполнил. Тогда перед королем вставала нетривиальная задача: «воздать» тем рыцарям, решившим остаться в войске для продолжения похода. Уговорами, угрозами, но чаще всего деньгами король удерживал при себе необходимое число рыцарей. Работало с переменным успехом, поскольку гарантии что рыцарь останется на службе у короля не было. Пехота-сержанты и прочие контингенты призывались по тому же вассальному праву, но на ином основании. Сержанты призывались не королем, а уполномоченными представителями: прево, городами и коммунами в королевских землях. Срок службы их был фиксированным – три месяца, после которых город требовал людей об-

ратно. В целом ситуация напоминала обстоятельства с рыцарями – королю постоянно нужно было искать способ сохранить свою армию после истечения срока. Сержантам выплачивалось жалование, составлявшее в 1202 г. двенадцать денье в день, или один ливр в месяц. Рыцарям же, в среднем и после окончания сорока дней, предлагалось пятнадцать ливров в месяц [1, 31]. То есть, за три месяца службы сержант получал три ливра, а рыцарь срок пять. Экономическое различие в положении налицо, однако при этом оно не вызывало серьезных возмущений и недовольств положением среди простых сержантов. Как было описано ранее само устройство общества предполагало эти различия.

Из бытовых различий логически произрастал этический аспект различия, так же разделенный на две части: связанный с особой почетностью службы королю, основанный на рыцарском восприятии понятия «честь», и на элитарности небольшого количества военных профессионалов. Сорокадневная служба королю была бесплатной для рыцаря; она отрывала его от рутины управления, от праздных увеселений и нормального времяпровождения давая взамен лишь тяготы похода, расходы и риск для жизни. Почему же лучшие люди своего времени ехали на войну? Ответ прост: они принесли оммаж сеньору, и честью являлось исполнение данной клятвы. Для людей, с детства воспитанных в условиях собственной значимости и исключительности честь действительно была дороже жизни. Служба мечом всегда являлась почетной. Сержанты же из числа простых горожан, торговцы и менялы, призванные «за гроши» (в понимании рыцаря) на службу и не обладающие боевыми навыками. Какую еще они могли заслужить репутацию в глазах рыцарства кроме презрения? Подобное высокомерное отношение наблюдалось также у наемников-рутьеров

к простым солдатам, но базировалось оно на профессионализме последних. Вообще, небольшая численность групп военных специалистов (инженеров, арбалетчиков, наемников, даже рыцарей) формировала замкнутые сообщества с обостренным чувством собственной элитарности на фоне массы простой пехоты. К сожалению, ввиду того что для людей того времени подобное явление считалось абсолютно естественной нормой жизни, немногие из хронистов подчеркивали разницу в отношении внутри армейских структур.

В армии Французского королевства сошлись люди всех сословий средневекового общества. Отношения внутри этой многофункциональной структуры развивались сложно, как бы копируя социальные проблемы и распространяя их внутри армии. Подобная система существовала во всех странах Западной Европы в данный период, но эти различия и сложности в отношениях стали сглаживаться с укреплением власти Филиппа II. Король пытался преодолеть проблемы в отношениях своих вассалов, сделав всех в армии «людьми короля», то есть закрепив на собственной персоне. После битвы при Бувине 27 июля 1214 г. король ходит и пирует среди своих сержантов, самых бедных и простых солдат [4, 271]. «... в согласии, в гармонии григорианского пения, хора ангелов с высоты небес, он упраздняет все диссонансы, все различия пола и возраста, равно как и различия звания, фортуны, занятия...» [4, 272]. Вместе его приветствовала Франция – от бедняка до епископа. Этот порыв, безусловно завязанный на одной конкретной фигуре, тем не менее заложил основу возможности преодоления неравных отношений благодаря новому появившемуся фактору и завершившему формирование триады объединения жителей средневековой Франции – христианская религия, старофранцузский язык, королевская власть.

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Section 3. Cultural studies

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PARTIES, PERIODS AND THE PATRIARCHY: PREDECESSORS TO THE MODERN-DAY PERIOD PARTY

Abstract. The celebration of a girl's first period (menarche) may appear as a modern attempt to normalize and de-stigmatize bodily functions like menstruation. Yet, the celebration of a girl's first period is a widespread event in indigenous cultures around the globe. This paper analyzes the cultural and social implications of these events. The analysis of the modern-day period party, the Pelazon, the Tamil Bathing Ritual and the Hupa flower dance will show that traditional celebrations of menarche are often tied to concerns of pollution, matrimony, and fertility. Nevertheless, even traditional celebrations have been updated to address more contemporary issues like identity and self-care.

Keywords: Menarche, body-positivity, anthropology, purity, pollution, feminism, menstruation, ritual.

Hardly any woman will forget the day she had her first period. The realization that one is now mature enough to bear a child hits hard for many menstruators. So do the potential for embarrassment, the physical pain, and the hormonal ups and downs that often accompany the monthly cycle. In addition, the fact that society treats periods as a taboo, something to be hidden away and concealed from the public eye in general, but the male eye in particular, has added an extra burden to the young woman undergoing this natural experience for the first time. With awareness of the stigma and shame surrounding menstruation, many young women also experience a new apprehensiveness – an inkling that our bodies are somehow deficient, diseased and no longer serving us reliably. As a case in point, research has shown that a girl's self-esteem plummets during puberty [21].

Recent years have seen an effort to normalize menstruation by hosting so-called “period parties”

for new menstruators. This paper will focus on social events and rituals that celebrate a girl's first period (menarche). In doing so, this paper will go beyond modern-day celebrations of this milestone by exploring non-Western rituals focusing on menarche. I will begin by discussing the modern-day “period party.” Then I will present cultural-anthropological models that have been applied to ceremonies that celebrate menarche. Subsequently, I will analyze three rituals of this type: the South American Pelazon, the Tamil Turmeric Bathing Ceremony and the Flower Dance of the North American Hupa. It will be shown that these ceremonies were, in fact, often enacted in patriarchal cultures in which women's fertility had to be controlled and guarded. Yet, with our modern-day efforts to normalize periods, more contemporary performances of these ceremonies are reinterpreted and reshaped into expressions of body positivity and feminism created to build confidence and self-esteem.

Modern Day Period Parties

Various online forums advertise the modern ritual of a “first moon” or “period party.” The trend, which was first introduced by celebrities like Bert Kreischer and Tyra Banks, is now catching on and so are discussions of whether these parties are really worth it. For example, the website “familyeducation.com” claims that first moon parties are “a great way to start to break down the stigma surrounding menstruation and instead empower our daughters to be proud of their bodies” [22]. Such informative sources also explain what types of gifts guests are expected: Motrin, uterus-shaped cakes, and pomegranate juice are popular acknowledgments of the event. At the same time, “experts” warn, “If all of your daughter’s friends are having period parties, she will probably be excited about her own, but if she’s the only one, she may not feel comfortable.” Similarly, in a *Washington Post* article, Cori Howard shared how she threw her daughter a First Moon party with the help of a Shaman who led meditation sessions and story time in a “red tent” set up for the occasion [27]. Yet, a period party does not need to be a grand-scale or expensive event. First Moon celebration kits are readily available online. And for those parents and daughters who favor arts and crafts, Pinterest and Instagram offer endless ideas for providing the appropriate decoration and designs for the perfect period party. Yet, what is really behind this trend? A glorified acknowledgment that may initially appear as a newfangled celebration of feminine body positivity turns out to be an ancient custom well established in indigenous societies of Africa, Asia, Latin- and North America. This observation begs the question as to what these ancient predecessors of the modern-day period party actually celebrate and how these often-elaborate rituals define femininity in cultures that are far removed from the societies of the industrialized West.

Rituals and Menarche from a Social Anthropological Viewpoint

Before I delve into the cross-cultural study of menarche and its various ceremonies, it is necessary

to provide a brief analysis of the meaning attached to these rituals. First, the custom of celebrating menarche can be understood as a rite of passage. This rite is significant because it involves a bodily process associated with impurity and fertility. Both of these concepts have larger implications for women and the roles they are expected to fulfill in society.

In Hindu culture, for example, the parents of a girl can declare that their daughter has become “available” as part of the menarche ceremony. The girl’s future husband will then present her family with a dowry so that she will be transferred from her original family to her husband with financial benefits [7]. Originally, declaring a girl’s availability was also a central factor in menarche ceremonies as they were celebrated in the Fijis before colonization. As researcher Marijke Sniekers has shown, tattoos were associated with womanhood and availability for marriage among Fijian women. However, these descriptive acknowledgments were applied only after the menarche ceremony. The tattooing process was followed by a feast attended by the future in-laws [12]. Similarly, among the non-Brahmanical castes of India, menstruation horoscopes are used to predict the nature of a girl’s future marriage. Non-Brahmanical castes view menarche as a source of great joy since it signals that a girl is fertile and available for marriage. The menstruation horoscopes are created based on the time of the bleeding, which older women determine by the degree of clotting. For non-Brahmins, the menstruation-horoscope could even supersede the birth horoscope. Still, historically, menarchal women required special protection because they were vulnerable to astrological dangers. Both Brahmins and non-Brahmins viewed menstruating women as a source of danger, although the risk associated with menstruation was much higher among Brahmins [15]. A similar phenomenon was observed in India, where a menarche ceremony, referred to as a Gauna, was carried out. Girls were married at an early age, but only with the onset of their periods were they released to live in their husband’s houses

[3]. These examples illustrate how the emphasis on marriage and reproduction led patriarchal cultures to ritualize and celebrate menarche. By contrast, in industrialized societies, girls are encouraged to pursue higher degrees and full-time employment before getting married. Consequently, menarche in these cultures signifies nothing more than “a particular transition in the life of a young woman, which serves to indicate maturation” [3].

Apart from signaling eligibility for marriage, menstrual blood also appears as a source of danger. The above-noted observation already implied that certain Hindu castes viewed menstrual blood as a threat. The fear of menstrual blood is in no way isolated to Hindu culture but is deeply rooted in many different societies, including Judeo-Christian cultures. Yet, the dangers associated with menstrual blood are especially pronounced in cultures that celebrate menarche. In a study on menarche rituals in Sri Lanka, for instance, Deborah Winslow discusses the experience of a girl called Kanti. When she begins menstruating, she is confined to her residence, guarded by her siblings, who keep her company to avoid attack by blood-hungry demons (*yakshas*) [20]. All other males, including the father and grandfather who live in the house, are not permitted to see her. According to popular belief, the *killa* (pollution) of the first menstruation is the strongest of all *killas* and is especially dangerous and harmful to men [20]. The association between menstrual blood and pollution can also be observed among Fijian women and the broader Pacific region [12]. Thus, it is believed that if a woman engages in activities like fishing or molding ceramics during her period, she or her family will become subject to misfortune [12].

The above-cited examples illustrate how menstrual blood is frequently considered a source of danger. What remains unclear is where and how this notion evolved. Perhaps, as author Mary Douglas argues, menstrual blood is considered impure because it is a bodily secretion that crosses certain physical boundaries, making it an anomaly – “a matter out

of place” [9]. Yet, as authors Thomas Buckley and Alma Gottlieb argue, pollution theory is not always the best model for understanding rituals surrounding menstruation, as becomes apparent in their introduction to *Blood Magic*:

One has the impression that most, if not all, societies view menstruation as a source of pollution, in extension of Douglas’s general theory, and that there is no more to be said. Yet it is clear that the situation is hardly that simple, and that the very power of pollution theory, coupled with Western societies’ own codings of menstrual blood as a pollutant, has perhaps created “dirt” where none previously existed, or existed only for some people and/or in some contexts in a given culture [5].

As an alternative to pollution theory, Buckley and Gottlieb advance the theory of “shared substance” to explain the inherent danger of menstruation. According to this theory, “culturally constituted symbolic anomalies such as menstrual blood may gather meaning from two directions at once to be both negative, or polluting, and positively powerful.” (*Blood Magic*, 34). Menstrual blood is frequently considered dangerous because it is powerful. It can be used in love potions, in apotropaic contexts and as a symbol of fertility.

For example, the Nigerian Tiv people mix menstrual blood with the blood of a sacrificial child in the *im-borivungu* (“owl pipe”) ritual. This ritual procures blessings for the farms around the ritual center enhancing the fertility of the women living in them [5]. A similar phenomenon can be observed among the Asante people of Ghana, who believe that the power of menstrual contamination can help protect the priests. Although menstrual blood has great negative effects, it can be controlled by those who are spiritually powerful enough to manipulate it by changing its value to something more beneficial [5]. Also among the Native American Cherokees, blood had the power to ward off evil, as is apparent in Cherokee mythology, where seven menstruating virgins helped destroy a monster [24]. While

the Cherokee regard for menstruating women and menstrual blood finds expression in mythology, the Yurok of California present a more practical attitude toward menstruation. In their view, a woman's power is at its peak during menstruation. Therefore, women should focus all their energy on meditation on the meaning of life during this time and should not be distracted by socializing or the opposite sex, so they isolate themselves [5]. Thus, some cultures insist on secluding menstruating women not because they are viewed as polluting, but rather because their bodily discharge is regarded as powerful and in need of spatial and social restrictions.

In short, rituals that celebrate the onset of menstruation display body positivity or embrace femininity, although this is only one possible interpretation. Typically, these celebrations are associated with patriarchal societies that focus on fertility, marriage, and reproduction. Some cultures consider menstruation a source of pollution while other cultures view it as a source of power. In both cases, menstruation and menstruating women are viewed as inherently dangerous. The following sections will examine three case studies of menstruation rituals. The first two are from societies that have consistently marked menarche by elaborate events. The last is from a native American tribe which has only recently reintroduced this ritual. We will see how certain aspects are reinterpreted to support young girls to become independent, strong and self-determined young women.

Pelazon

We begin with the so-called Pelazon ritual (or Yüüechíga/Worecühiga), celebrated by the Tikuna Tribe in the Colombian and Brazilian rainforests. The name "Pelazon" can roughly be translated as "nipple ceremony." Scholars disagree about the particulars of the Pelazon and whether it humiliates or uplifts the girl in question. The ritual begins with a period of seclusion which could last anywhere between three months and a year [11]. Elderly women are enlisted as teachers and lecture

the girl about the traditions of their tribe as well as the obligations and responsibilities of her as a woman, wife and later, a mother [19]. In some cases, we are informed that girls do not cut their hair during this period [11]. The seclusion serves two goals. For one, a girl who has entered puberty is considered frail and vulnerable, like a newborn. She, therefore, must be kept away from any source of potential harm. At the same time, she might harm the community, as the blood spilled outside of her body could attract disaster [29; 30]. The second reason for seclusion is more practical and has to do with the need to procure food and drink for the celebration [33]. No matter the length of the seclusion, the sources all note that the subsequent celebration entails constant music, singing and dancing that can last between three and four days [11]. In addition, the girl's body is painted black with a natural pigment called uito. The application of paint too serves as a protection against harmful spirits [29; 30]. Finally, the girl is ordained with a headdress that shows the emblem of the girl's tribal association. The headdress is decorated with feathers and shells that symbolize fertility. Identifying the exact tribe is important because the ceremony also signals that the girl is eligible for marriage, and members of the Tikuna always marry outside of their tribe [29; 30]. Traditionally, the girl's hair would be pulled out by the root – a very painful procedure. To mollify the pain, the girls would drink alcohol and were instructed to cry silently if it was necessary [29; 30]. Nowadays, however, the hair is cut by scissors. The girl is expected to jump over a fire after the ritual. Finally, the celebrant is bathed in the river, which symbolizes the final stage of purification and welcomes the girl into the world of adulthood [19].

In conclusion, Pelazon can raise the status of girls and initiate women into new obligations and responsibilities with an emphasis on marriage and fertility. Yet, according to some sources, certain aspects of the ceremony could appear humiliating, painful, or even

dangerous [16]. Overall, however, the celebration of menarche is considered a positive event. The whole community rallies around the girls as they embrace their new roles as adult women and take on new responsibilities within their tribe [11].

Turmeric Bathing Ceremony/ Manjal Neerattu Vizha

The next ritual for discussion hails from South Asia, where it is celebrated among various ethnic groups [23]. For example, in Tamil Nadu, in South India, young girls who have started menstruating participate in a ritual called “Manjal Neerattu Vizha.” This term roughly translates into “Turmeric Bathing Ceremony” and is regarded as a precursor to marriage [23]. Like the Pelazon, this ritual may both benefit and harm the young women in question.

When a girl first starts menstruating, she enters a period of ritual seclusion that may last between nine, eleven or thirteen days. The exact length of the seclusion is irrelevant – as long as it is an odd number [25]. One of the girl’s relatives, most commonly an uncle, will build a “kudisai” hut with coconut, mango, and neem leaves. The small enclosure can be inside or outside the girl’s residence [31]. The seclusion may point to a state of impurity that endangers the individuals in her environment. At the same time, the seclusion may be necessary not because the girl is polluting her environment in the strict sense of the word, but because the menstruant’s body is filled with power that may easily harm if it is mismanaged [6]. Whatever the case may be, the young woman remains isolated within the hut, where neighborhood women occasionally visit her and prepare ceremonial meals [28]. At the end of her seclusion, the women will color the girl’s feet with a mixture of red ochre, turmeric, and limestone.

The concept of pollution plays a major role in the event. The girl must adhere to certain rules in the week before the ceremony. For example, she may eat only vegetables. She is not allowed to talk with males or enter a temple because she is considered impure at that time. According to popular belief, talking with

men and boys will lead to facial acne [17]. Again it is not clear whether this points to a state of pollution or a condition of enhanced power. At the end of her time in seclusion, the hut is torn down, and the space is purified [28]. The girl then has a first bath in water that is colored with Manjal (a yellow powder). Following the bath, the young woman wears a traditional garment called Saree – her first Saree. She is also adorned with a Mala necklace made of wooden beads that represents womanhood. Following this rite, the girl sits in the room and recites incantations with a priest, who makes predictions about her future. Next, everybody moves in a circle in front of her to conjure good luck for her future. After that, friends and relatives present her with gifts [31]. The ceremony is not only meant to mark the transition of a girl into womanhood, but also signals that she is now of marriageable age [25]. Furthermore, it has been suggested that the treatment of the menstruant recalls the treatment and worship of goddesses, implying that menarchal girls are inherently powerful and the restrictions on a celebrant’s conduct are meant to protect the people around her [14]. Nevertheless, although the occasion appears festive and the young woman is celebrated and honored, it has also been observed that the recipients of all the attention, namely the menstruating girls, are deprived of education. That is, they are not prepared for their onset of menstruation, nor are they later educated about their anatomy, feminine health, or proper hygiene [17]. Thus, even though the occasion is one of joy, the girls do not always benefit from the ritual in question and emphasize their status as potential brides rather than on self-awareness and empowerment.

Flower Dance

So far, we have explored menarche rituals that boast long traditions and have been celebrated for uninterrupted periods. Now, we turn to the Native American Hupa, who settled in Northwestern California. This tribe celebrates menarche through a ceremony called Flower Dance. Contrary to the Pelazon or the Turmeric Bathing ritual, the Hupa ritual had been discontinued for decades before being revived

several years ago. Its revival has presented the tribe with the unique opportunity to remove outdated or harmful aspects of the ritual and to reinterpret the respective traditional steps following contemporary challenges faced by members of the tribe.

This ritual celebrating menarche involves running, ritual bathing, dancing, and communal singing [1]. As already mentioned, the ritual itself is called “Flower Dance” or “Ch’ilwa: l,” which means “they beat time with sticks” and refers to the rattles and sticks that are pounded as part of the ceremony. The girl is known as a “kinahldung,” which means “girl having her first flower dance.” She typically wears a veil of blue jay feathers that cover her eyes [13]. The ceremony is said to last somewhere between three to ten days. Each ritual stage embodies a specific meaning, the most important of which is the running, which shows how the young woman will navigate her life [1]. Like the Pelazon and the Turmeric Bathing Ceremony, the ritual also has educational and purifying components. Older women visit the young girl and tutor her concerning her conduct as a woman. They instruct her in prayer, song, and skills such as taking care of herself and maintaining a proper demeanor in public [26]. The ceremony itself also includes an element of self-care, as the girl immerses herself in a river and burns herbs that she has prepared for the special occasion [10]. The sections of the river in which the girl is to undergo immersion are referred to as “tims” and are considered “lucky.” The ceremony ends with a large feast, where the celebrant receives gifts and uses her power and unique state to extend blessings to her tribe [18].

Although the ritual is ancient, it has not been celebrated regularly during the past century. As part of an effort to assimilate the tribal traditions of the Hupa into American mainstream culture, government programs and agents forced the flower dance ceremony into obscurity by arguing that only “dirty, stupid, primitive people” would engage in a ritual that celebrates menstruation [2]. Nevertheless, some elders can still remember the event from their

childhoods. For instance, a member of the Hupa tribe known as “Thelma” recalls: “I felt real good about myself going through this flower dance, going into womanhood” [26]. She advocates for reviving this ceremony because, in her view, this event leads women through their adult lives. In fact, recent years have seen a push to reinstate this ceremony and the new participants respond mostly positively.

For one, the revitalization of this custom presents a form of “decolonization” which restores the Hupa’s identity and nationhood [2, P. 8]. The ritual helps to counteract the often unstable and broken homelife experienced by many Native Americans. For example, Kayla, a girl who had just held a Flower Dance ceremony, said that the ceremony allowed her to heal emotionally from her parents’ divorce. After the event, she remarked that the various rituals illustrated how “we were all still working together as a family for myself and for my other siblings, for the children. So in a big way it’s family medicine.” [2, p. 133]. Also, the ritual can help to install a sense of confidence and strength in young members of the Hupa tribe. According to a 2008 CDC study, 39 percent of Native American women report being victims of domestic violence [2, p. 127]. The high domestic violence and sexual assault rates have caused great suffering for Hupa women. Several possible solutions may lie in governmental support or educational programs. However, as Cutcha Risling Baldy, the main advocate for the resurrection of the Flower Dance, observes: “Ch’il wa: l is a tangible, physical, spiritual, and communal act of healing and decolonization” [8]. It can help strengthen the Hupa because it “provides a clear rejection of dominant colonial narratives that seek to disempower and victimize Native women” [2]. Thus, women are provided with a ritual tool to reclaim their independence and assert themselves in their private and public lives. Risling Baldy stresses that this ritual is helpful even for young men, as they are taught that they are not “the center of the universe” [4].

Unlike the Pelazon and the Turmeric Bathing Ceremony, the Flower Dance has fallen into disuse

and has been revitalized only in recent years. Consequently, as it is performed now, the ritual emphasizes identity building and strengthening girls' confidence and is less focused on marriage, fertility, or pollution. As a result, this ritual, although ancient, appears to be closer to modern-day period parties.

Conclusion

In recent years, many new menstruators have marked the important developmental milestone of menarche by celebrating so-called "period parties." These parties can take the form of anything from a small informal gathering to an elaborate, carefully planned event with a long guest list, a tent, and even a shaman. This paper set out to explore the more ancient predecessors of this modern-day phenomenon together with their rationales, symbolisms, and histories.

As shown, rituals marking a girl's menarche are widespread across the globe. The popularity of this type of event can most likely be explained by the close association of menstruation with fertility, marriage, and reproduction. Furthermore, menstruation and menstrual blood were often considered polluting in nature or powerful to the degree that menstruating women needed to be isolated for their own and society's protection. The tendency to associate

menstruation with pollution, power, fertility, and matrimony was apparent in the Pelazon as well as the Tamil Bathing Ceremony. Although these rituals have been slightly reinterpreted in recent years, they traditionally announce that a young woman is now available for marriage or stress the danger inherent in the body of the young menstruant. Only the Flower Dance celebrated by the Native American Hupa tribe focuses on building self-confidence and instilling a sense of cultural belonging. This difference in interpretation is likely because the Flower Dance ceremony has only been recently revived after having fallen into disuse for almost a century. Thus, its meaning has also shifted to reflect more contemporary concerns related to young women's lives.

Also, as shown, the custom of period parties has a long tradition. Nevertheless, the meaning and rationale behind this custom are ever-changing. What was once an opportunity to announce a girl's availability and to warn society of potential dangers is now reformulated to meet the needs of the twenty-first century. As such, modern-day parties mark a stage of life and present an opportunity to strengthen a girl's self-esteem, to normalize menstruation as a healthy function of the female body that one should embrace rather than fear.

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Section 4. Pedagogy

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TEACHING CHILDREN'S LEARNING FOR ELECTRONIC EDUCATION STUDENTS IN UNIVERSITIES IN THE CUC LONG RIVER DELTA SITUATION AND SOLUTIONS

Abstract. Literature is diverse in genres and rich in content. reality of teaching children's literature to primary school students has many advantages, but there are also many shortcomings and limitations. In order to improve the quality of teaching to meet the educational renovation needs of the Party and the State, we propose some orientations on the program content, apply teaching methods, test and evaluate to improve the quality of teaching and learning. organization of teaching children's literature.

Keywords: children's literature, current situation, teaching methods, assessment.

1. Introduction

Children's literature is one of the compulsory subjects for specialized training in primary education at universities, with a relatively wide knowledge of folklore, to the history of the development of children's literature, along with the characteristics of children's literature, as well as authors and works about children from Vietnam. to famous authors in the world, from works written by children to works written by famous writers and poets for children. This is a piece of literature that is very diverse in genre and rich in content. reality of teaching children's literature to primary school students has many advantages, but there are also many shortcomings and limitations. On the basis of that research, we suggest some orientations to apply teaching methods to organize teaching children's literature in order to improve teaching quality to meet the educational renovation needs of the Party. and set forth by the State. Therefore, it is required that lecturers have pedagogical capacity to guide

students to access this amount of knowledge and re-apply teaching later after graduation.

2. Research content

2.1. Importance of children's literature module for students of Primary Education in the Mekong Delta

Children's literature is considered an important chapter in the module Literature contributes to providing knowledge Literature basics and capacity building pedagogy for students majoring in primary education. With a rich variety of genres and a wide variety of compositions, children's literature is taught in universities to students majoring in primary education. After graduating from school, students become primary school teachers, students will teach this part of literature. Thus, children's literature is not only taught at university, but after graduation, students will meet again and again, and children's literature is used as a corpus a lot in Vietnamese textbooks in primary schools since then. Grades 1 to 5, not stopping there, in moral and scientific education

lessons, children's literature materials also account for a significant part.

In this course, students are provided with the history of the development of children's literature, the content and artistic characteristics of poetic works and stories in the works of some typical authors such as: To Hoai, Pham Ho, Vo Quang, Nguyen Huy Tuong, Doan Gioi, Tran Dang Khoa, ...

Children's literature not only provides knowledge but also contributes to the formation and development of students' research-learning abilities. staff, orientation for professional training, pedagogical capacity such as: equipping children with knowledge of children's literature for primary school students, understanding the characteristics of children's reception of literature; fos-

tering professional skills, professional skills, and pedagogical qualities to become primary school teachers in the future through activities of practicing teaching skills. Therefore, how to associate teaching with practice is the task of teachers of children's literature.

2.2. Situation of teaching and learning children's literature for Primary Education in the Mekong Delta region

2.2.1. Survey results

To assess the situation of teaching children's literature to students of primary education, we will conduct a survey on the program content, methods, teaching organization and measures. student assessment methods for the teaching process of teachers.

- About the content of the program

Table 1.

No.	Content of the children's literature program	Universities in the Mekong Delta				
		Can Tho	Dong Thap	Tra Vinh	An Giang	Tien Giang
1.	Literary theory				×	
2.	Children's folklore: with genres: Myths, Legends, Fairy tales, Fables, Jokes, Folk songs, Proverbs, Puzzles, Dong Dao, Ve	×	×	×	×	×
3.	Development process Development of Vietnamese children's literature	×	×	×	×	×
4.	Vietnamese children's literature authors: To Hoai, Nguyen Huy Tuong, Pham Ho, Tran Dang Khoa, Vo Quang, Doan Gioi ...	×	×	×	×	×
5.	Foreign children's literature with typical authors: Grim, Andecsen, Tagor, ...	×	×	×	×	×
6.	Local children's literature		×			

Contents of children's literature programs of universities in the Mekong Delta region

- Methods and forms of teaching organization

The survey results of 35 lecturers from universities in the Mekong Delta are shown in the following table:

Table 2.

No.	Method and form of organization of teaching	Level		
		Frequently	Occasionally	Never
1	2	3	4	5
1.	Presentation	35/35= 100%	0/35= 0%	0/35= 0%
2.	Problem solving and problem solving	18/35 = 51.4%	15/35= 42.9%	2/35= 5.70%

1	2	3	4	5
3.	Group teaching	29/35= 82.9%	4/35= 11.4%	2/35= 5.70%
4.	Theatricalization of literary works	24/35= 68.6%	10/35= 28.6%	1/35= 2.90%
5.	Other methods and forms of teaching organization	6/35= 17, 1%	16/35= 48.6%	13/35= 37.10%

Table: Methods and forms of organization of teaching children's literature programs of universities in the Mekong Delta

2.2.2. Comment

Advantage:

About the program content: The schools all agreed to choose the basic contents that are: Children's folklore, Vietnamese children's literature, foreign children's literature... Thus, the program's content relatively reasonable to meet the goals, requirements as well as knowledge of children's literature that students need to be equipped and able to apply it after graduation to teach.

In terms of teaching methods and organization: in the teaching process, lecturers often use the method of presentation, group teaching and theatricalization of literary works. In which, 100% of the lectures used the presentation method, 82.9% used the group teaching method and 68.6% used the theatrical method of literary works. From the above results, we can see that the teaching staff is aware of the right direction to innovate teaching methods. Teachers have applied active teaching methods in the teaching process.

About the forms of examination and assessment: University lecturers in the Mekong Delta often organize regular midterm and final exams according to the examination and evaluation regulations of the universities. University. This is consistent with current regulations.

Through teaching practice and observation, we found that lecturers paid attention to the problem of conveying information and knowledge about children's literature to students. In one lesson, many teaching methods have been combined with the content of the lesson and the students to help students firmly grasp the knowledge. After each lesson, there

is a question content and some related documents are provided for students to read.

Limit:

About the content of the program: The content of literary theory is not taught by most schools. The local children's literature is only taught by Dong Thap University.

About teaching methods and organization: Using teaching methods in some classes is still weak, so the quality of lectures has not been achieved as expected. Lecturers are also heavy on one-way knowledge transfer. The organization of research orientation for students in some contents is still unclear.

About the forms of inspection and evaluation: The way to check and evaluate is not flexible. During the teaching process, teachers can also evaluate them in regular tests such as: calculating positive points during group participation, attendance points, presentation points when giving presentations, or assessment points on assignment content. study and learn more. The assessment content still leans towards the ability to remember and reproduce documents, not to bring into full play the capacity of creativity, imagination and the ability to apply knowledge in practice.

Besides, many students are still passive in the process of acquiring knowledge. Some students have not actively participated in group activities and group work, but only a few members represent the working group.

Based on the analysis of advantages and limitations, we propose some solutions to improve the quality of teaching children's literature for universities in the Mekong Delta.

2.3. Some solutions to orient the application of teaching methods study to organize teaching children's literature

2.3.1. Contents of the program

The Mekong Delta region currently has 5 schools specializing in Primary Education, including: Can Tho University, Dong Thap University, Tra Vinh University, An Giang University and Tien University. Giang. The unification of curriculum content between disciplines plays an important role. For this module, it is necessary to ensure the diversity of genres with the following types of lessons: Literature history (general overview of the development of Vietnamese children's literature), genre type (genres of folklore), the type of article about the author and the work, the type of article that analyzes the work with different types of works ... Therefore, the teacher must flexibly adjust the teaching method to suit each genre and content of knowledge., guarantee program duration.

2.3.2. Method and form of teaching organization

Selecting and applying teaching methods based on knowledge content

Children's literature section is general knowledge including: type of literary overview article, type of author's essay, type of essay item practice analysis ... So with For each specific type of lesson, the lecturer must pay attention to the characteristics of the unit knowledge of the lesson to be able to determine the right goals, outlines draft the right focus of the lesson and propose appropriate teaching methods suitable for students to acquire knowledge in the most effective way.

For example: With the general type of lesson, students will learn, the system develop and expand knowledge of historical contexts, basic characteristics and outstanding achievements of the development stage, typical works, authors, knowledge of characteristics, content, art of children's literature. This is the basis for students to have can be applied to conduct analysis, evaluation, and teaching true to the basic features of the works. At the same time, when teaching style In this lesson, the lecturer also helps students improve their ability to synthesize, Exploiting curriculum ma-

terials to forge more style independent learning. For this type of post, we can exploit advantages of lecture, question-and-answer, group discussion, and visualization methods. Specifically as follows:

Learn terms, concepts, lecturers use a combination of questions and answers and lectures. because these two methods will provide students with complete information sufficient and accurate in terms and concepts.

Instructors use group discussion and visual methods to learn the characteristics and development process of children's literature. Because these two methods create a great interactive environment for faculty and students, helping students share their concerns, experiences and insights with group members as well as other groups. and knowledge acquisition, intellectual development, behavior adjustment, and self-development of thoughts, feelings and actions.

With the author type, the teacher can use a combination of methods of consult, lecture, raise and solve problems, live group discussion, because for this type of lesson, students need to gain knowledge about life, career as well as important Creative concept, creative content, artistic characteristics of authors.

With the type of work analysis, teachers should ask students to do their own homework and present and share their work. yourself in the group. Then in class, the teacher uses the questioning method Responding in conjunction with raising and resolving throughout the process learn, analyze articles from which students analyze prices content and artistry of works.

For example, when instructing students to analyze the work *Cricket In the adventure book*, we ask students to fulfill the requirements Asking after class before going to class:

Read *Cricket Adventure To Hoai's*

Divide into groups, each group has about 5–6 students. Groups assign each member to do 1 exercise, exercises choose not to match. Students then share their homework yourself with group members.

Image Exercise: When you read the work, you keep a mental picture of the story. You can draw it

out and share with friends in the group. When drawing, you need captions to remember where the image came from, what do you came up with it and why do you want to draw it.

Artistic exercises and special tricks of the author: When reading the work, the author uses good words, clearly portray them in the reader's mind, using funny language... Make a note of examples of these such special thing that the author used in the work.

Character Profile Exercise: Think of a character that you love. Draw diagrams to show shapes, actions, behavior, interesting points of that character.

Event Sequence Exercise: Sometimes the sequence of events in very memorable work. You can draw a sequence diagram actions.

Self and story exercise: When reading a work, a certain character or event that made you think about life? live personally. Please write and tell your friends in the group hears about a certain character, event, or idea makes you think about your life.

Explanatory Exercise: When you read, think about the author I want to tell you something through the story. Please write it down your own interpretation, listen to, similarsimilarand different points.

Book Review/Criticism Exercise: When reading, sometimes you feel "Absolutely great" but sometimes you think "if As an author, I would write differently. Please write down the points of the work and the shortcomings that need to be overcome. When they come to class, to the activity of analyzing the work, they I asked the question: "In the work, which character do you like the most? any? Why?" and ask students to use homework to answer, discuss, and share the feelings of character itself.

– *Applying teaching methods combined with instruction Students' self-study Students' self-study.*

Activities play an important role and are a direct factor in improving the quality of training at universities. For higher education, self-study is considered a way of learning at the university level. According to author Nguyen Canh Toan: "Self-study is thinking by yourself, using intellectual capacity (observing,

comparing, analyzing, synthesizing...) and sometimes even muscles (when you have to use them). tools) along with their own qualities and motives, emotions, personal outlooks, and worldviews in order to occupy a certain field of human knowledge and make that field their own [2, p. 59–60]. Self-study in the learning process of students is the work of the students I independently complete assigned tasks, with support direct or indirect help of the lecturer. Practice habits and self-study skills are to give them the opportunity to master be active, promote your positivity and creativity, and here It is also the basic goal of the innovation of teaching methods now. Teaching in a positive way, requires instructors to organize for students to self-directly explore, discover, develop knowledge, thereby forming cognitive capacity, their self-learning ability. Students self-study in two forms: self-study in class and self-study at home.

For self-study in class, teachers need to organize, guide students to study actively and proactively by assigning common tasks for the whole class or for each group of students. After After assigning the task, the teacher limits the time to complete succeed in that. In class, the teacher covers, helps, guide them when needed. After a while For a certain period of time, students present their results, and lecturers edit and supplement them additional knowledge.

For the form of self-study at home, the sense of self-discipline, Learners' movements are more clearly expressed, want to achieve To be effective in learning, teachers need to prepare a number of questions and assignments in advance for students, and the lecturer also proposes a plan to test and evaluate the results of students' self-study. In order to form self-study skills for students, lecturers need to help them learn by themselves by reading textbooks, systemizing knowledge by mind maps, teachers can design some questions, Worksheets require students to complete. In addition, teachers must provide reference materials for students to research, learn and complete the requirements of the lecturer.

For example, before learning the lesson *Overview of Vietnamese folk culture*, we provide students with the following references:

1. La Thi Bac Ly (2003) *Textbook of Children's Literature*, Publishing House Hanoi Pedagogical University.

2. Tran Duc Ngon – Duong Thu Huong (1998), *Literature Vietnamese children*, Education Publishing House, Hanoi.

3. Cao Duc Tien (editor) – Duong Thi Huong (2005), *Van Training materials for elementary school teachers at college level* and University of Education), Education Publishing House, Hanoi.

To test students' self-study at home, teachers can set up study sheet. In the form, there are clearly written questions related to the important information content of the article. Students are required to complete. Come to class, ask students to present and discuss in groups or in class.

– *Applying combined teaching methods to elicit background knowledge and stimulate students' interest in learning*

Students' levels and interest in the subject in the classroom vary. Therefore, to achieve the highest educational effectiveness, teachers need to learn background knowledge and measures stimulate students' interest in learning by collect information as well as the needs of learners. We can use KWL vouchers to learn knowledge student background. Thanks to the above information KWL slip that we adjust the method and timing learn that content. In addition, teachers also need to spend a lot of time learning how to stimulate interest in learning and create a receptive attitude for learners because the level of interest of learners in the subject is different. . For example, teachers can organize a few games related to the lesson, design many exercises for students to choose to study on their own. For example, when teaching an *overview of children's literature*, teachers can organize students to participate in a jigsaw puzzle to stimulate their interest in learning and create a comfortable and lively classroom atmosphere. The lecturer

prepares some pictures to show the content of the work; the puzzle piece with the author's name; piece inscribed with the name of the work. The teacher invites 2 teams to participate, in an equal amount of time, the team that can match the most correct information, that team will win.

2.3.3. *Forms of testing and assessment*

In order to record student learning outcomes, testing and evaluation play a very important role because through testing, teachers can understand students' learning ability so that they can learn from that. The lecturer will adjust the teaching method to suit the learning process of the students. In the process of teaching Children's Literature to students of Primary Education, we use the following forms of assessment:

Examination and evaluation will follow the academic regulations issued by the university, usually with There are two forms of assessment: process assessment and end-of-course assessment.

With process

Assessment Process assessment is an assessment during the student's participation in the module. This assessment is agreed upon by lecturers and students in the following forms: after 15 periods, there is a test, students' scores for presentations, comments, cognitive assessment, and attendance scores.

The assessment does not stop at the teacher's assessment of students, but the assessment here students can evaluate students through the presentation stating the advantages and disadvantages, and the students themselves self-review. About themselves in the process of participating in learning, teachers need to have a spirit of receiving students' evaluations of their teachers, so that teachers can promptly correct and adjust their working methods.

In the assessment process, the lecturer will find out the factors affecting the student's educational results in order to have timely and timely solutions to improve the quality of education and teaching.

To evaluate the process makes sense when students participate in the assessment and evaluate themselves. When students take an active role in de-

veloping grading criteria, self-assessment, and goal setting, it means that students are ready to accept the way that has been developed to assess ability. his learning. With this assessment, it will create motivation and encourage students to voluntarily participate in activities in the teaching process, to gain knowledge for themselves.

Summative assessment

In addition to the process assessment in the academic regulations, there is also a form of summative assessment. Summative assessment is done after the student has completed the course of study. The organization of the final assessment exam can be taken at the end of the semester or after completing the course at least a week. The final evaluation weighted score is calculated at 50%, and the regular assessment is calculated at 50%.

The form of summative assessment such as: Essay test, multiple choice, large assignment, essay is organized by the Faculty or Department.

The main objective of the summative assessment is to determine the level of achievement of students, in order to review the student's learning outcomes after a semester, the end of the course.

In addition, like other forms of assessment, the summative assessment helps teachers gain useful information to review and adjust (if any) from the objectives, content and improvement of methods. teaching methods, innovation of assessment methods oriented to capacity development.

Improvement evaluation

In addition to the above two forms, many schools also conduct improvement evaluation. The evaluation measures to improve the departments will survey the teaching of lecturers about: content, methods, organizational form of teaching, pedagogical style.

The objective of the improvement assessment is that the school collects objective information related to the teaching process of the lecturers such as: teaching content, teaching organization process, teaching methods and techniques, shape and form. methods, means of teaching and assessment. Teachers who receive this assessment will self-regulate their teaching. Thus, improvement assessment is considered as the final step to complete a teaching cycle of the subject, and at the same time orients for new values of the following teaching cycle.

3. Conclusion

Teaching is a science and also an art. Teaching at university needs to be more scientific and calculated high art. Teaching children's literature to students at university is an elaborate, serious and demanding process Ask the lecturer to love the job, be enthusiastic and have an organizational method flexible lecture organization, sticking to specific purposes and by many new methods can equip students with knowledge system original children's literature. To achieve high efficiency when teaching learning, teachers must master the basic knowledge and find in-depth understanding of children's literature, mastering the advantages and disadvantages of teaching methods to apply and combine Active and skillful methods suitable for teaching content. Beside In addition, teachers must also pay attention to eliciting the background knowledge of learners, designing teaching tools and means, organizing Organize group discussion and presentation activities for learners work, interact, learn from each other. Using teaching methods suitable in a synchronous combination of teaching methods with each other will create a positive effect, bring the desired effect Waiting for the teaching of children's literature in primary education at universities.

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CONSTRUCTIVIST APPROACH AND RESEARCH SKILLS

Abstract. The application of the constructivist approach in higher education aims to form competencies and skills for searching, structuring and conducting independent research. Guided by aspects of the constructivist approach and its relationship to research skills, a study was conducted. The purpose of this article is to study the opinion of students on the topic.

Keywords: constructivist approach, research, skills.

Changes in the education system in recent years are a fact. Universities strive to provide conditions and educational environment adequate to the high requirements of modern society. An environment in which students can reach their potential.

The main idea of the constructivist approach is to put students in practical situations in which to acquire skills for different forms of research activities. This will give them confidence and the opportunity to transform their knowledge into new situations. The application of the constructivist approach in higher education aims to form competencies and skills for searching, structuring and conducting independent

research. Setting such tasks assigns the role of student “researchers” who, using their accumulated knowledge and skills, can transform them into new activities.

According to Radev, “Learning in constructivism is a process of going through successive situations through which the individual acquires knowledge and competence” [5].

T. Fosnot defines constructivism through the prism of several principles: ... learning involves inventing ideas rather than mechanically accumulating facts; meaningful learning is done by rethinking old ideas and reaching new conclusions about new ideas that are at odds with our old ones [4].

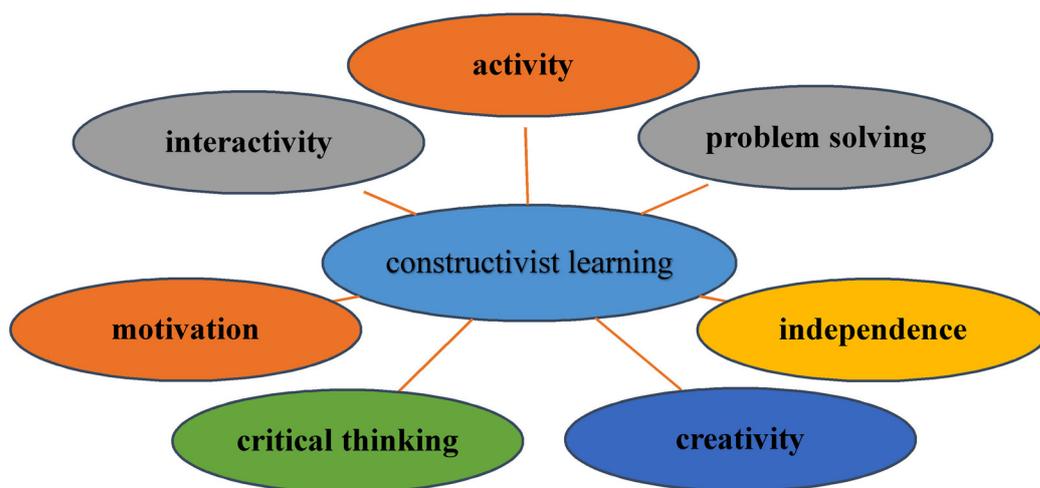


Figure 1. Aspects of constructivist learning

According to Adriana Tafrova-Grigorova, the new knowledge is built on the basis of the previous knowledge and experience of the individual as a result of purposeful activities in a specific situation. Popularly formulated descriptive descriptions of constructivism in education include the “philosophy of learning” [2].

Buzov believes that: “... attempts to decompose the system of main activities of teachers and students in the learning process, in essence translate into practice the ideas of constructivism – a doctrine according to which man actively constructs his own understanding or knowledge through the interaction of between what he knows and what he believes in” [1].

The main aspects of constructivist learning are presented in (Figure 1).

Guided by the ideas of the constructivist approach and the most important aspects of constructivist learning and its relationship with research skills, a study was conducted at the Faculty of Engineering and Pedagogy-Sliven, among students majoring in “Preschool and primary school pedagogy”, educational qualification “Master”. The created questionnaire used a “liqueur scale” for grading the answers.

The formulated statements provide an opportunity to gather information from the respondents. The students evaluated the ten statements given to them through five different degrees of agreement or disagreement: 5 – I strongly agree; 4 – I agree; 3 – I have no opinion; 2 – I do not agree; 1 – I strongly disagree.

The first of the proposed statements is: “I easily cope with my research tasks”. The results are: “I strongly agree” – 25%; “I agree” – 45%; “I have no opinion” – 10%; “I do not agree” – 15%; “I strongly disagree” – 5%. The obtained results give us grounds to say that the students, who think that they are confident in the research tasks set by the teachers – 14 of the respondents, believe that this is the case.

“Finding an innovative solution to a problem is a challenge for me” is the second statement offered to students – “I strongly agree” – 30%; “I agree” – 55%; “I have no opinion” – 5%; “I do not agree” – 5%; “I strongly disagree” – 5% are the preferred answers. Innovative thinking is one of the most valuable life skills of our century. Teachers face different challenges and problems on a daily basis. The skills to react quickly and make innovative decisions is a sure way to deal with them quickly (Figure 2).

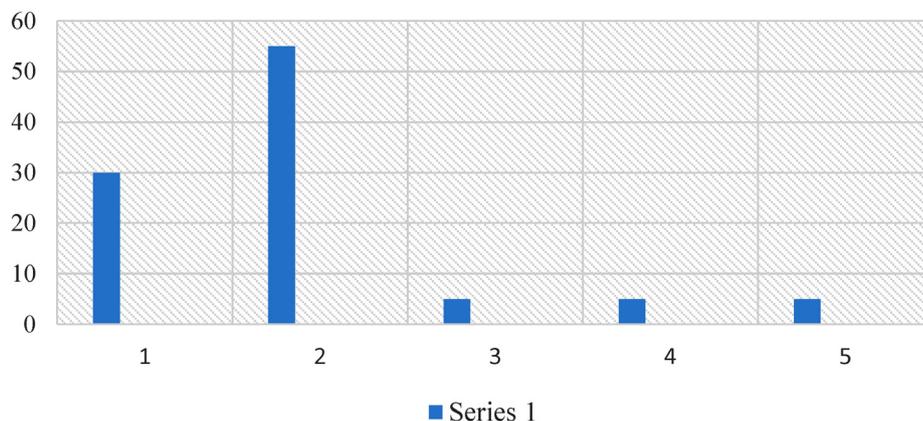


Figure 2. Finding an innovative solution to a problem is a challenge for me

“Following an algorithm by the teacher facilitates research work” – “I strongly agree” – 20%; “I agree” – 55%; “I have no opinion” – 10%; “I do not agree” – 10%; “I strongly disagree” – 5%. Whenever they have an algorithm set, students feel more confident in their abilities. By following the steps set by the

teacher, they reach the final research product more easily. However, there are students who want to run away from the algorithm or not follow it.

The statement “I have the opportunity to be creative and independent in my research activities” and the results obtained gave us an answer to the question of freedom

and the right to choose through creativity and independence to perform research tasks. “I strongly agree”

– 15%; “I agree” – 65%; “I have no opinion” – 5%; “I do not agree” – 10%; “I strongly disagree” – 5%. (Figure 3).

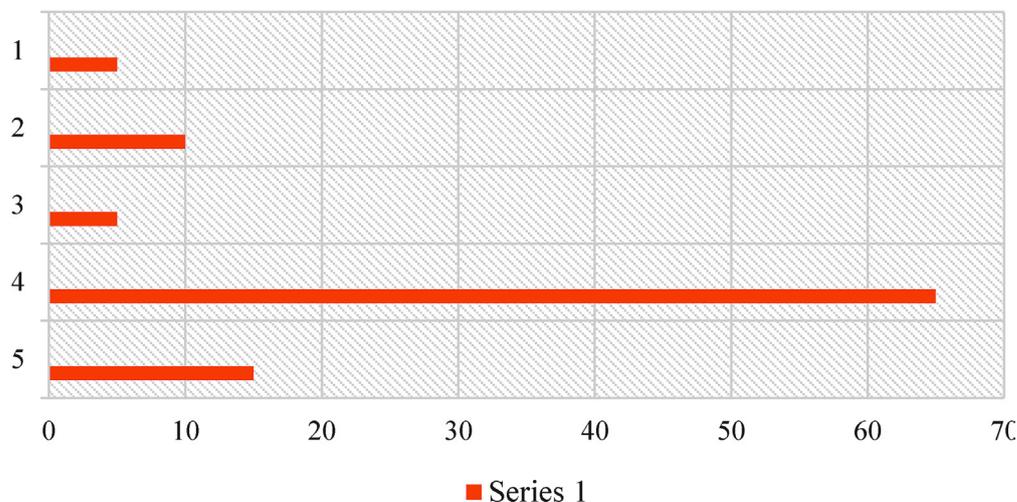


Figure 3. I have the opportunity to be creative and independent in my research

“I prefer to have freedom in deciding to conduct research” – “I strongly agree” – 15%; “I agree” – 50%; “I have no opinion” – 5%; “I do not agree” – 15%; “I strongly disagree” – 15%. This is the statement that best shows us the extent to which students have formed independence as a skill.

“I can apply scientific knowledge in practical situations” – “I strongly agree” – 10%; “I agree” – 60%; “I have no opinion” – 10%; “I do not agree” – 15%; “I strongly disagree” – 5%. Students’ self-esteem is important in terms of research because it shows their self-confidence and confidence in applying what they have learned.

“I prefer different types of teaching and research tasks” – “I strongly agree” – 25%; “I agree” – 55%; “I have no opinion” – 5%; “I do not agree” – 10%; “I strongly disagree” – 5%. Students like the variety of different types of research tasks.

“I apply modern methodology in conducting research” – “I strongly agree” – 10%; “I agree” – 50%; “I have no opinion” – 15%; “I do not agree” – 25%; “I strongly disagree” – 5%. More efforts are needed in this direction by teachers and students.

“I have developed skills to work on projects” – “I strongly agree” – 25%; “I agree” – 55%; “I have no

opinion” – 5%; “I do not agree” – 15%; “I strongly disagree” – 0%. Project work is often team work. Students cope with this fact and have no problem reaching the goal together.

“As a result of the training my professional competence has increased” – “I strongly agree” – 35%; “I agree” – 45%; “I have no opinion” – 5%; “I do not agree” – 10%; “I strongly disagree” – 5%. The last statement and the obtained results give us hope that at the end of their studies the students know that they have increased their competencies and can be realized successfully.

As a comprehensive conclusion from the study, we can say the following:

The training in the master’s program is aimed at the formation of various professional competencies in the field of teaching and educational work. Knowing and dealing with everyday challenges and complex situations requires educators to have communication skills, cooperation, skills to quickly solve problems and make adequate decisions. Applying a constructivist approach to teaching will increase interest in research and future teachers will be able to apply their skills successfully in their pedagogical practice.

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RESPONSIBLE QUALITY OF MIDDLE SCHOOL AND HIGH SCHOOL STUDENTS IN VIETNAM

Abstract. The research is to determine the level of responsible quality of middle school and high school students in Vietnam. The results show that the average score on the responsible quality of the surveyed middle school and high school students has a high average on a 5-point scale. In which, the responsible quality for the family is the highest level, followed by responsibility for oneself and the surrounding living environment; responsibility for the school reaches the lowest level. There is no significant difference in the level of responsibility between groups of students in a demographic way. Level of responsibility is positively correlated with some characteristics of personal nature and the learning of responsibility from the school and the students' living and communication trends. These are positive forecasts for students and schools in enhancing their responsibility in life.

Keywords: Responsible quality, Responsible quality of students, personal characteristics, learning of responsibility.

Introduction

Responsibility and responsible quality are studied by many scientists. Psychologist Levinas (2009) defined, the responsibility was the act of responding to others in sharing, empathizing and helping others. According to Le Thi (2009), the responsibility was a sense of morality and a sense of law, in the performance of obligations set by society. Responsibility was the proportionality between action and duty, and it also was a consequence of human free will and a characteristic of human conscious action. Pham Minh Hac (2018), responsibility was considered to include responsibility for oneself, work, community, society, and country. Responsible quality, especially social responsibility, which was one of the core values and the most noble social value of an individual's personality. Responsibility, along with hard work, patriotism, education, behavior, profes-

sion and conscience were the core values of an individual's personality.

There are many in-depth studies on factors of the responsibility. For example, research by A. L. Xlobotxky et al (1976), the responsible attitude was considered as a factor regulating social behavior, the change on behavior of social responsibility depends on responsible attitude. K. Muadubaép (1983), investigated responsible attitude in activities. The results shown that responsible attitude was associated with action. Through action, an individual's sense of responsibility can be reflected.

In a study of "*Moral responsibility – a personality quality*" T. G. Gaevaia (1984) pointed out the formation of students' responsibility. Accordingly, responsibility included two factors: Subjectivity and behavior. Subjective factor included perception and motivation. The behavioral factor was associated

with altruism. In addition, he also discovered that the period of forming a responsible attitude, the impact of personality education on students shall depend on the psychophysiology of each age. Nguyen Tai Dong (2013), mentioned the contents of social responsibility as an obligation of individuals as well as of the social community for decisions and actions so as to increase obligations and benefits for each member of society. According to La Thu Thuy (2014), the social responsibility was also defined as the conscious compliance to social norms by an individual or a social group, which is based on an individual's understanding of social ethics and law. In a short study of "Main Qualities of High School Students", Nguyen Ke Hao (2016) also mentioned students' responsible quality, with the contents of personal responsibility, responsibility for family, community, school and society.

In general, in the studies, the responsibility is understood as the individual's commitment and fulfillment to the requirements of others, of society and of oneself, based on the recognition and acceptance of the value of those requirements and commitments. Responsibility is expressed through the individual's awareness, consciousness, attitudes, actions and feelings when making commitments. Social responsibility includes responsibility for oneself, family, community and living environment.

In Vietnam, since 2018, a new general education program has been implemented in the direction of developing learners' quality and capacity. In which, there are identified 5 personality qualities that need to be educated for students: patriotism, compassion, honesty, hard work and responsibility. Responsible quality is limited to expressions of responsibility for oneself, family and society as well as responsibility for living environment (Ministry of Education and Training, 2018). In order to effectively implement the education of responsible quality for high school students under the new general education program, it is necessary to have a full assessment of the student's responsibility and related factors, so that appropriate measures can be taken.

Purpose of research

This study aims to assess the current situation of the responsible quality of high school and middle school students today and the relationship between responsibility and individual psychological factors of students and learning from family, school and society in developing their responsibilities.

Survey subjects

The survey subjects are 383 students randomly selected from 6 middle schools and high schools under 3 provinces/cities: Hanoi, Hung Yen and Thanh Hoa. Demographic structure characteristics of the survey subjects: Gender: 146 male students (42.82%), 219 female students (57.18%); birth order in the family: first-born child (only child): 238 (62.14%), second-born child: 145 (37.86%); level of participation in collective activities: participating: 237 (61.88%), not participating: 146 (38.12%); for academic results: Excellent: 294 (76.76%), Good: 88 (22.45%), Average, weak: 3 (0.78%); for morality: 326 (85.12%), good 52 (13.58%), average, weak: 52 (13.58%); Father's occupation: Farmer, worker: 30 (7.83), Civil servant: 165 (43.08%), Businessperson, Freelancer: 159 (41.51%), retired person: 29 (7.57%). Mother's occupation: Farmer, worker: 27 (7.05), Civil servant: 215 (56.14%), Businessperson, Freelancer: 138 (26.03%), retired person: 3 (0.78%).

Research Method

The research method was the self-assessment scale of middle school and high school students on the contents related to their responsibilities for themselves, their family, school, society and living environment. The structure of the self-assessment scale consisted of 3 topics: (i) Self-assessment on the students' responsible quality, including 110 items; (ii) Self-reflection on the own psychological characteristics: 52 items; (iii) self-reflection on learning of responsibility from family, parents, school and from society, including 15 items. Each item of the scale and the whole scale were determined according to 5-point likert scale: The lowest level: corresponding to 1 point and the highest corresponding to 5 points. Between levels 1 and 5 were

levels 2,3,4 in the increasing direction for the students' responsibility level and related factors.

The Cronbach's Alpha coefficient of the substructures in the scale, which ranged from 0.922 to 0.936. The value of the full scale was 0.932, showing that the scale ensured the necessary reliability.

KMO coefficient = 0.878 > 0.5: Factor analysis was suitable with research data. Bartlett's test result was 6149,842 with significance level sig = 0.000 < 0.05, proving that the data used for factor analysis was completely appropriate.

Results

Average score of responsible quality and percentage of responsibility level of middle school and high school students by demographic characteristics

Table 1 describes the statistical data on the average score, average score difference, lowest score, highest score and median score on personality quality of the surveyed group of middle school and high school students. The results show that the average score on the responsible quality of the surveyed students has a high average level. Specifically, the average score on the responsibility as a whole reaches average high level and relatively concentrated (Mean= 3.84 /5 points; SD = 0.57; Min = 1.71; Max = 5.0 and Median = 3.88).

The average score of the component responsibilities is also high average. Specifically, responsibility for family (3.91; 0.67); responsibility for oneself (3.86; 0.644) and responsibility for living environment (3.86; 0.75); next, social responsibility (3.80; 0.64); finally responsibility for the school (3.74; 0.66).

Table 1. – Average score on responsible quality of the surveyed group of middle school and high school students

	Responsible quality	Average score	Difference	Min	Max	Median
1.	Responsibility for oneself	3.86	0.64	1.00	5.00	3.90
2.	Responsibility for family	3.91	0.67	1.10	5.00	4.00
3.	Responsibility for the school	3.74	0.66	1.71	5.00	3.71
4.	Social responsibility	3.80	0.64	1.85	5.00	3.85
5.	Responsibility for living environment	3.86	0.75	1.38	5.00	3.88
	Responsibility in general	3.84	0.57	1.71	5.00	3.88

Regarding the demographic characteristics, Table 2 describes the average score on responsibility and the results of testing the difference in the average score on responsibility of the surveyed target groups according to demographic characteristics: Gender, birth order in the family, the degree of participation in collective activities of the class, academic results, morality and occupation of parents.

In terms of demographic characteristics, it shows that male students have a higher mean score on multiple-choice tests than female students (3.86 > 3.82); the group of students who are the first-born child or only child, has lower average score on responsibility than group of students who are second-born child (3.80 < 3.89); the group of students with

participating (monitor, branch secretary) have a lower responsibility score than group of students without or rarely participating in collective activities (3.80 < 3.89); the group of students with excellent, good, average and weak students have the average score of: 3.82; 3.91 and 3.71 in turn; the group of students with good, fairly good and average conduct scores are: 3.85, 3.75 and 4.12, respectively. In terms of occupation of both parents, the average score of the group of students belonging to the family with a father/mother being farmer, worker have higher average score on responsibility than other groups' score. However, the results of the independent T test (univariate test) and Anova test (multivariate) show that the statistical difference between the different groups can be

surveyed based on the demographic characteristics of the group without statistical significance. That is, the difference in the average score on responsibility is not significant between the groups of students surveyed.

Table 2. – Average score on responsibility and results of testing the difference in the average score on responsibility between groups according to demographics

No.	Factors		N	Mean	SD Mean	Difference				
						SE	95%CI		P	
1.	Gender*	Male	164	3.86	0.55	0.04	0.06	-0.07	0.16	0.099
		Female	219	3.82	0.59					
2.	Birth order*	First-born child / Only child	238	3.80	0.58	-0.09	0.06	-0.21	0.03	0.558
		Second-born child	145	3.89	0.56					
3.	Participating in works *	Yes	237	3.80	0.57	-0.08	0.06	-0.20	0.04	0.777
		No.	146	3.89	0.57					
4.	Academic results**	Excellent	294	3.82	0.60	-	-	-	-	-
		Good	86	3.91	0.47	0.09	0.07	-0.08	0.26	0.591
		Average/Weak	3	3.75	0.82	-0.07	0.33	-0.87	0.73	0.991
5.	Conduct**	Good	326	3.85	0.57	-	-	-	-	-
		Fairly good	52	3.75	0.57	-0.10	0.08	-0.30	0.11	0.749
		Average/Weak	5	4.12	0.58	0.27	0.29	-0.42	0.96	0.999
6.	Father's oc- cupation**	Worker/Farmer	30	3.90	0.62	-	-	-	-	-
		Civil servant	165	3.85	0.54	-0.05	0.11	-0.35	0.26	0.999
		Businessperson, Freelancer	159	3.80	0.57	-0.09	0.11	-0.40	0.21	0.999
		Retired person	29	3.82	0.74	-0.07	0.15	-0.47	0.34	0.999
7.	Mother's oc- cupation	Worker/Farmer	27	3.94	0.65					
		Civil servant	215	3.87	0.56	-0.07	0.12	-0.38	0.24	0.999
		Businessperson, Freelancer	138	3.77	0.58	-0.16	0.12	-0.48	0.16	0.999
		Retired person	3	3.35	0.32	-0.58	0.42	-1.69	0.53	0.993

*Independent T test; ** Anova test*

Average score on individual psychological characteristics and average score on learning the responsibility of middle school and high school students

The individual characteristics and responsible learning of middle school and high school students are selected in this study as variables that are assumed to have an impact on the responsible quality of the survey subjects.

Table 3 describes average quantities on the individual characteristics of middle school and high school students. Individual personality factors relat-

ed to responsibility have a high average score (3.69; 0.76), seemed to be tilted in favour of the high side (Median 3.79). Among the lifestyles, the democratic style has the highest average score (3.86; 0.76), followed by lifestyle of free trend (3.47; 0.74), and finally the authoritarianism style at the moderate and very dispersed level (2.62; 1.08). Lifestyles that are more people-oriented than work-oriented have a high and higher average score, more focused than work-oriented styles (3.51; 0.79 vs. 3.33; 0.81). The average scores on both introversion and extroversion are average, in which the average score of introversion is higher than

that of extroversion (3.35; 0.79 vs 3.06; 0.89). The personality model that focuses on the interests of others, attaching importance to relationships with others,

which has a higher average score and more focused than the model that focuses on self-benefit and self-interest (3.65; 0.75 vs 3.11; 0.94).

Table 3. – Average score of individual characteristics of middle school and high school students surveyed

Factors	Mean	SD	Min	Max	Median
Individual characteristics related to responsibility	3.69	0.76	1.00	5.00	3.79
Authoritarian style	2.62	1.08	1.00	5.00	2.60
Democratic style	3.86	0.76	1.00	5.00	4.00
Free style	3.47	0.74	1.60	5.00	3.50
Work-oriented style in communication rather than people in communication	3.33	0.81	1.00	5.00	3.40
People-oriented style in communication	3.51	0.79	1.40	5.00	3.60
Extroversion	3.06	0.89	1.00	5.00	3.00
Introversion	3.35	0.79	1.20	5.00	3.40
I-You Model	3.65	0.75	1.20	5.00	3.80
I-It Model	3.11	0.94	1.00	5.00	0.94

Table 4 describes the average score of middle school and high school students on learning the responsibility from school, family, and society. The results show that, learning of responsibility from par-

ents, family has an average score of 3.71; 0.81 that is high, and higher, more focused than that of learning the responsibility from school and from society (3.63; 0.86 and 3.52; 0.91).

Table 4. Average score of of middle school and high school students on learning the responsibility from school, family and society

Factors	Mean	SD	Min	Max	Median
Learning from the school	3.63	0.86	1.00	5.00	3.71
Learning from parents, family	3.71	0.81	1.00	5.00	3.80
Learning from society	3.52	0.91	1.00	5.00	3.67

Correlation between the average score on responsibility with average score on individual psychological characteristics and average score on learning the responsibility of middle school and high school students

Table 5 is the test results of the correlation between the average score on responsibility with average score on individual psychological characteristics and average score on learning of the responsibility of middle school and high school students

The test results show that there is a **positive correlation** between responsibility scores and individual characteristics scores and responsibility

learning score from family, school and society of middle school and high school students. In which, the moderate correlation is the correlation between the responsibility score and the responsibility learning score from the school ($R = 0.55$; $B = 0.37$); between responsibility score and individual personality score ($R = 0.54$; $B = 0.40$), between responsibility score and democratic lifestyle score ($R=0.51$; $B=0.39$) and a style focusing on the interests of others, and human relations ($R= 0.51$; $B=0.39$).

The correlations between responsibility score and free style, work-oriented style, people-oriented

style, introversion, extroversion, self-interest model, learning the responsibility from family and society, which have a low correlation ($R < 0.5$). There is a

positive correlation between responsibility score and authoritarian style, but at a very low level ($R = 0.14$; $B = 0.07$).

Table 5. – Correlation between the average score on responsibility with average score on individual psychological characteristics and average score on learning the responsibility of middle school and high school students

Factors	R	R ²	B	SE of B	p
Individual characteristics	0.54	0.29	0.40	0.03	0.000
Authoritarian style	0.14	0.02	0.07	0.03	0.008
Democratic style	0.51	0.26	0.39	0.03	0.000
Free style	0.39	0.15	0.30	0.04	0.000
Work-oriented style in communication rather than people in communication	0.33	0.11	0.24	0.03	0.000
(Subject) People-oriented style in communication	0.36	0.13	0.26	0.03	0.000
Extroversion	0.27	0.07	0.17	0.03	0.000
Introversion	0.21	0.04	0.15	0.04	0.000
I-You Model	0.51	0.26	0.39	0.03	0.000
I-It Model	0.22	0.05	0.13	0.03	0.000
Learning from the school	0.55	0.30	0.37	0.03	0.000
Learning from parents, family	0.44	0.20	0.31	0.03	0.000
Learning from society	0.34	0.12	0.22	0.03	0.000

Multivariable linear regression model of factors related to the responsibility of middle school and high school students

In order to test the predictive influence of the factors on the students' responsibility surveyed, we use a multivariable linear regression model. Eighteen variables are proposed to establish a linear regression related to students' responsibility. In which, the variables belonging to participating in/not participating in collective activities, birth order in the family, variables on learning outcomes, authoritarian style, work-oriented style, variables on propensity to introversion and extroversion, self-benefit-oriented model, learning of responsibility from family and society which are predictors with-

out having a strong impact on students' responsibility score ($R > 0.05$).

The factors related with statistical significance to the variation of the students' responsibility score are identified in Table 6. The model explains 56.2% of the variation of the teachers' passion score.

The factors related with statistical significance to the variation of the students' responsibility score, respectively (from high to low) are: Individual characteristics $B = 0.17$ [95%CI 0.10–0.24], Learning responsibility from school $B = 0.16$ [95% CI 0.08–0.23], Model for the benefit of others: $B = 0.15$ [95% CI 0.06–0.24], democratic style $B = 0.13$ [95% CI 0.05–0.21], the people-oriented style in communication $B = 0.10$ [95%CI 0.18–0.02], finally the free style $B = 0.09$ [95%CI 0.01–0.16].

Table 6. – Linear regression model between average score on responsibility and relevant factors

No.	Factors	B	SE	95%CI of B		p
				Lower Bound	Upper Bound	
1	2	3	4	5	6	7
1.	Individual characteristics	0.17	0.04	0.10	0.24	0.000

1	2	3	4	5	6	7
2.	Democratic style	0.13	0.04	0.05	0.21	0.001
3.	Free style	0.09	0.04	0.01	0.16	0.024
4.	People-oriented style	0.10	0.04	0.18	0.02	0.019
5.	I-You Model	0.15	0.05	0.06	0.24	0.001
6.	Learning from the school	0.16	0.04	0.08	0.23	0.000

$$R = 0.697; R^2 = 0.586; R^2_{adjust} = 0.562; F = 20.315; P_{anova} < 0.001; B_0 = 0.174$$

Discussion

This study aims to discover the level of responsibility of middle school and high school students in Vietnam, including responsibility for oneself, the family, the school and the living environment. The contents of responsibility quality are based on the responsibility criteria introduced in the Master Education Program promulgated by the Ministry of Education and Training. The results show that the average score on the responsibility of the surveyed high school students is high on a 5-point scale. In which, the quality of responsibility for the family has the highest level, followed by responsibility for oneself, for the surrounding living environment, and responsibility for the school is the lowest level. This is an issue that needs to be paid attention to in educating students' sense of responsibility, attitude and responsible actions towards their learning environment and daily activities.

There is no significant difference in the level of responsible quality between groups of students considering demographic characteristics such as gender, level of participating in collective activities, birth order in the family as well as occupational composition of parents. The establishment of a linear regression model also shows that these variables are not predictive of the variation of the responsibility scores. This

shows that students' responsible quality has a weak relation with the demographic factors of students.

The student's responsible quality has positive correlation to the student's individual features, which is individual characteristic; learning the responsibility from school; lifestyle for the benefit of others; democratic style, people-oriented style and free style in communication. This shows that the variation of the above factors will lead to change in the student's responsible quality. These forecasts can be positive suggestions for students and schools in improving students' responsibility in life.

Conclusion

The study aims to determine the level of responsibility of middle school and high school students, contributing to developing a database, serving the implementation of the new general education program (2018) in Vietnam. Specifically, educating the students' responsible quality – is one of the 5 qualities that the educational goal is aimed at. The study has solved the problem of determining the level of responsibility of middle school and high school students (responsibility for oneself, family, school, society and living environment); identified individual factors that are related to and have an impact on the variation of the students' responsible quality, which is the database for determining measures to strengthen responsibility for students.

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APPLYING POSITIVE DISCIPLINE IN PARENTING

Abstract. The family environment greatly affects children's development. It, especially parenting styles, can facilitate or make it difficult for children's personality development. In Vietnam, positive discipline has not been widely adopted in families for many reasons. Meanwhile, many families have still used negative discipline, consequently, adversely affecting children's growth and well-being. Thus, positive discipline and how to take it in families were introduced in this article to help parents easily apply them in their parenting.

Keywords: discipline, positive discipline, negative discipline, education, parenting, natural consequences, logical consequences, limit setting, time-out.

Introduction

In parenting, if parents have ever felt uncomfortable and improper using corporal punishment, then positive discipline may be the optimal alternative. Positive discipline can be combined/replaced with conventional parenting methods to change and correct children's misbehaviors with more positive methods, both mentally and physically. It is considered one of the effective, civilized ways to have a balance between love and strictness when teaching children about life lessons.

It is supported by experts that positive discipline for misbehaving children can bring certain benefits to both parents and children, especially the high possibility to strengthen the bond between parents and children with mutual respect. This method also helps effectively reduce conflicts between parents and children, and teaches children that they can cope with difficult times without scolding, intimidation or corporal punishment. Although positive discipline can cause children to face some punishment from their parents, it allows parents to prevent their children's misbehaviors.

Literature review of positive discipline in parenting

Professor Cluver said, "As parents, we do not want to scold or beat our children. We do it because

we are too stressed to find any other way", "Like a drug that does not work and affects your health, when we find one useless, it is a good reason to look for a new approach."

When a child has been committing or is about to commit a misbehavior, it is required that educators impose disciplinary measures. Hence, discipline is a common measure taken by educators to change children's misbehaviors. Yet, discipline exists in two forms: positive discipline and negative discipline.

Positive discipline is in favor of the best interests of children. It does not involve damaging their physical and mental health but includes an agreement between adults and children, consistent with the latter's psychophysiological characteristics. In other words, positive discipline makes use of natural and logical consequences to establish rules and disciplines in families and schools as well as a time-out to help children abandon their misbehaviors.

In contrast, negative discipline uses corporal punishment (such as hitting, slapping ears, slapping butt, etc.) and mental punishment (swearing, insulting, etc.) for children to get rid of their misbehaviors.

In Vietnam, negative discipline appears commonly in families with the following main forms: swearing or scolding; addressing children with abusive language; keeping them alone in a locked room;

punishing them to stand in the sun; tying them up; or hitting (with a tool or hand, etc.)

In recent years, there has been an increasing public concern about repeated cases of domestic violence against children with serious consequences. Physical and mental punishment may result in many consequences. Specifically, parents' disciplinary measures may:

- Negatively affect the parent-child relationship. Children will feel confused and anxious. For everyone, parents are always the most special people. Giving birth and bringing up children, parents always give them the best things and unconditional love and are willing to sacrifice everything for them. However, suffering parents' negative discipline, children will become anxious and confused with negative thoughts like: "Are my parents not loving me anymore?", "Am I the biological child of my parents?" or have negative feelings or behaviors such as anxiety, fear, leaving home, and committing suicide;

- Affect children's physical and mental health. Living in anxiety and fear for a long time may cause some children to face psychological diseases such as anxiety illness and depression. Some children suffer long-term physical effects or even are killed by their parents' brutal beating;

- Make children angry and want to take revenge. When severely beaten or scolded, children will become stubborn, feel humiliated, and want to take revenge to satisfy their anger. It can be the cause of other misbehaviors of children to a greater extent than the initial one;

- Make children feel worthless. When a child is scolded or criticized or beaten a lot, he will feel that he cannot do anything good or nice, no matter how hard he has tried. Consequently, he will lose confidence in himself, and feel inferior, leading to a lack of confidence;

- Lead to children's dishonest behaviors such as lying and cheating. Children are subject to severe physical and mental punishment for every mistake, whether intentionally or unintentionally. There-

fore, when making mistakes, they tend to blame others to avoid responsibility or try to get good results, at all costs and in all ways, including wrong and unethical manner, harming others, so as not to be punished;

- Make children no longer afraid of negative discipline. Human emotions and feelings are adaptive. Children are so accustomed to repeated negative discipline that they no longer feel shame, humiliation or pain. Thus, there is no motivation to change their misbehaviors;

- Create children's thinking that violence is a way to solve every problem as they learned from their parents. When children do wrong or have undesired behaviors, parents scold or beat them. Hence, when children participate in activities in other environments or other social relationships, they can also apply these measures to people around them. These measures will likely be applied by children to their old parents or their future children. As a consequence, violence will become pervasive in society.

Given the enormous consequences of negative discipline, it is time for parents to change their minds about the use of discipline in parenting. The prevalence of negative discipline is partly because of the old-fashioned Vietnamese educational view that "Spare the rod, spoil the child". In addition, there are many other reasons such as misperception about the immediate effect of negative discipline on changing a child's behavior, lack of understanding of children's psychophysiological characteristics, and no access to positive discipline.

Five principles of positive discipline to be kept in mind by parents

- Positive discipline is a method of balancing kindness, affection and strictness.

- Positive discipline helps children feel close and meaningful to their parents.

- Positive discipline has a long-lasting effect.

- Positive discipline provides children with social and life skills to be good people.

– Positive discipline enables children to discover their hidden potential and positively use their energy.

Content of and how to take positive discipline in parenting

1. Consequence measure

Content of the measure

Through this measure, children can figure out that every behavior has certain consequences. The application of this measure serves two main purposes: teach children to be responsible for their own behaviors while encouraging them to make responsible decisions (going to school, going to bed on time, doing homework, etc.) and use it as an alternative to punishment, allowing children to learn good manners in a scolding-free way. Moreover, this measure promotes a warm parent-child relationship, with fewer conflicts.

There are two types of consequences: natural consequences and logical consequences. Natural consequences are those that occur naturally, without adult intervention. Meanwhile, logical consequences require the intervention of adults or other subjects. For instance, if a child does not study, he will get a bad grade, or if he break a toy, he will not get a new one for a certain time.

1.2. How to take the measure

When taking this measure, parents should keep in mind that:

Parents should allow children to experience behaviors without danger to themselves and those around them and draw lessons for themselves. For example, children will understand that if they do not eat, they will be hungry; if they do not treat others well, they will have to play alone; making unthorough decisions may lead to failure, etc. Parents should consider using either a natural consequence or logical consequence measure on a case-by-case basis. If these experiences are positive, children are more likely to repeat the behavior. Contrarily, children will limit it if the experience is negative.

Concerning behaviors that may be dangerous to children and those around them, parents need to

provide children with persuasive explanations such as reasons for not performing a behavior, its possible consequences and other good alternative ways to do it.

It is recommended to let children's mistakes go and take them as lessons because to err is human. If parents are tolerant and cleverly apply the logical consequence measure, children will feel understood and sympathized with, subsequently, recognizing and correcting their mistakes.

Parents should accept children's imperfect first time doing something and patiently guide them so that they can do it better next time. Children will see it as encouragement, not disparagement or derision. If parents refuse to allow children to do things on their own, they will gradually get used to being dependent, passive, and lazy. As an example, a child may not have a clean bath the first time; however, instead of helping him bathe the next time, parents should persistently guide the child to do it better next time.

The prerequisite for using this measure is a foundation of mutual respect, cooperation and encouragement in the parent-child relationship. To change a child's behavior, parents should first get him to cooperate with them instead of confronting them. To obtain the child's cooperation, parents also have to be cooperative. To be respected by the child, parents must show respect for him.

2. Limit Setting Measure

2.1. Content of the measure

The limit setting involves establishing rules, regulations and discipline to educate, nurture and ensure the healthy and safe development of children. It helps children identify which behavior is appropriate or inappropriate and have a habit of maintaining order in the family, classroom and society.

2.2. How to take the measure

It is worth noting for parents in applying this measure that:

The limit setting requires the engagement of all members. Limits can be set at 3 levels: Permitted behaviors (without prior notice); Permitted behaviors (with prior notice); and Unpermitted behaviors.

Limits should be established for stable, repetitive and domestic activities and behaviors such as eating, playing, resting, studying, and working. Attention should be paid to the difference in age and nature of work as well as other factors of all family members and the participation of all family members. Explanations (e.g., reasons for no smoking or permission before leaving home) are recommended to be provided in advance for unpermitted activities or those requiring the consent of adults.

Limits should be set before embarking on every new duty with children's clear understanding of the limits and the consequences of breaking them. This will help children capture the limits of their behaviors and commit no negative attitudes such as tantrums or stubbornness.

There should be a commitment to adherence to limits by all family members, in which parents are the role models for children to follow. For more effectiveness of the commitment, such limits can be made in writing and signed or left their own signs thereon by the members. The commitment will be carefully in a conspicuous position to highlight members' responsibility for the limits they have committed.

Limits should be set in a flexible manner. For instance, a child may stay up later than usual on his birthday. However, consideration should be taken in each situation so as not to easily compromise with the child, devaluing the limits and consequently making the child frequently disregard the limits.

When children go beyond the committed limits, parents need to calmly follow the accompanying instructions and avoid anger and mental and physical insults towards children. Take an example, a child is not allowed to use the phone for the next 2 days if he has used it for more than 2 hours as committed. Parents should not scold or beat him, just repeat the commitment for him to follow.

3. Time-out measure

3.1. Content

Children are often in a bad mood when they are about to perform or are engaged in misbehaviors.

Thus, such measures as advice or punishment do not work in this case. Children will feel that their parents do not understand them as well as the problems they are facing and the reasons why they do so. Even to a more complicated extent, children will feel unjust, unfair, and unloved. Therefore, children must be allowed to balance their emotions, and easily get and accept the influences of their parents. During such time, children also have the opportunity to review and evaluate their own behaviors, enabling parental interventions to be more effective later.

To sum up, a time-out is a period to isolate a child who is or is at risk of engaging in undesirable behaviors (fighting with his friends or destroying his own toys, etc.) from his current activity. During the time-out, the child must sit in one place without participating in the same activities as others.

3.2. How to take the measure

In taking this measure, parents should:

Choose the right space and time. Regarding the space, for no punitive nature, children need to be left in a space where they feel safe. Dark, noisy spaces or places with many factors that cause confusion and fear for children should be avoided. In terms of the time, the measure should not last more than 15 minutes and 5 minutes for those under 6 years old. Otherwise, the measure will not work because children's attention will be transferred to another activity.

Determine goals for children during the time-out period so that they can properly orient their actions and thoughts, avoiding distractions from other unrelated activities.

After the time-out period, parents are suggested to patiently listen to their children to catch on to their thoughts and feelings, as well as the causes of misbehaviors and their aspirations for addressing the consequences of their misbehaviors. Parents should gently and cleverly point out mistakes and limitations in their children's current or potential behaviors and then work with children to seek ways to correct and overcome them.

3. Conclusions

The use of negative discipline measures in parenting causes numerous consequences, including, among others, hindering and making it difficult for children's development. Therefore, parents should be equipped with knowledge about the psychophysi-

ological characteristics of their children's age, give up outdated educational views and methods that hurt children's physical and mental health, and have access to, capture and know how to apply positive discipline measures in parenting for the best development of their children.

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Section 5. Political science

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PROBLEMATIC ASPECTS OF COMPARATIVE STUDIES

Abstract. Comparative research today is an objective need, a necessary and living reality. Comparative analysis makes it possible to understand the political practice of various countries, to carry out a political forecast, helps to identify valuable experience, makes it possible to take into account the negative aspects, the inefficiency of certain political decisions. Comparative research allows you to go beyond a particular country, to make broader scientific generalizations.

Keywords: comparison, method of comparative analysis, comparative political science, types of comparative studies, methods of comparative analysis extrapolation of scientific knowledge, problem of incompatibility, non-identity of political science categories, non-identity of political terms, Galton's problem.

Comparative analysis methods. Comparison, the method of comparative analysis, is becoming an integral part of political science. Its range of applications in the study of politics has made comparative analysis central to political science. Its importance is constantly growing. Its primary objectives are: to develop a knowledge system of governance and politics in general; to evaluate political experiences, institutions, behaviour and processes in terms of cause-effect relationships; and to predict events, trends and consequences. Comparative research performs three functions: interprets variables in terms of analytical frameworks; identifies problem areas and trends; and predicts institutional trends and processes. Comparative research has to follow the following steps: 1) collecting and describing facts based on and subject to carefully constructed classification patterns; 2) identifying and describing similarities and

differences; 3) formulating experimental hypotheses; and 4) testing hypotheses through empirical observations to develop initial ideas. One important aspect of comparative political science research is data collection. Data collection requires **a certain logical structure, an analytical framework.**

The advantages of an analytical framework are the following: the study of a political system on the basis of the proposed categories makes it possible to compare it with other systems on the basis of the same categories. Analytical frameworks allow the study of political processes in different systems through comparison; comparative research reveals more fully the tools for achieving goals; comparative research reveals areas where intended actions may cause unintended consequences. The American political scientist Roy Macridis showed the possibilities

of comparative analysis by elaborating a framework of four main analytical categories of political systems: a) deliberative process and decision-making as a function of politics, b) forms of power and its social and political dimensions, c) ideology and its role in political motivation and institutional organisation, and d) organisation of political power. Systemic and structural-functional analysis play a particularly important role in comparative political analysis [1].

David Easton described the main features of systems analysis of the political system in the following way: 1) The political system is a series of interactions through which values are distributed in society. Easton emphasises the element of an “authoritative (binding) allocation of values” in the political system. 2) The political system has a “responsive” and “self-regulating” capacity to modify, adjust internal processes and structures to avoid self-destruction. 3) A political system is an open system, amenable to change under the influence of external environmental factors. 4) The environment of a political system may be intrasocietal and extrasocietal. 5) A political system can remain stable if there is a balance between “input” and “output” impulses [2].

Gabriel Almond’s structural-functional approach complemented the systemic systems approach. According to Almond, the inputs and outputs of a political system should be analysed in terms of the functions embedded within the system. Who, what structures, what functions do they perform and how? Almond is interested in the role played by the stable structures of the political system. Almond attempts to address the stability and permanence of structures by naming the functions that contribute to the maintenance of the system – regulatory, extractive, distributive and reactive [3]. The structural-functional approach shows high efficiency in the comparative analysis of political systems, operates with a whole set of variables, offers a number of standardised categories successfully applied in the analysis of different political systems. Some political scientists argue that the structural-

functional approach to politics is conservative in its methodology, as if it is biased towards supporting the status quo, because it describes a set of institutions that exist at a given time. But even taking into account this limitation of structural functionalism, it has enriched comparative political science. The representatives of this approach have more clearly identified the complexity of relations between social and political phenomena; promoted the importance of the functions of the political system and focused attention on the entire social system as the medium for political phenomena.

The American political scientist Karl Deutsch has developed a cybernetic model of the political system. Deutsch likens the political system to a self-adapting cybernetic system. Governance consists of piloting, which depends on information about the position of the target, the distance left to cover and the results of previous actions. Deutsch analyses the system through the prism of feedback, i.e. in terms of controlling actions based on the experience of previous mistakes. In this theory it is information that determines the effectiveness of power. The government acts as a cybernetic system: it makes decisions independently on the basis of information about the external environment and about its own state. It is necessary for information to circulate throughout the system, nerve it with numerous networks, “nerves of government” [4]. There is a need for power to be informed and to be able to inform for effective governance. It is necessary that there are various communication networks, information channels, movement of information from power to citizens and from citizens to power.

The abovementioned concepts open new horizons in political science. These approaches are very useful for macroanalysis problems, for studying the variables on which the preservation of the type of system depends, and they are very suitable for systematic empirical analysis.

Also, the systems approach in comparative political science allows comprehensive coverage of such problems in comparative political science as models

of democracy and dictatorship, horizontal and vertical, functional and territorial separation of powers, essences and forms of state, political institutions, institutions of political leadership, legislative and judicial institutions, electoral systems, political cultures in a comparative perspective.

The scope of comparative political science is extremely varied. The object of comparative analysis can be the territorial organization of power in different countries, which is characterized by different forms of vertical and horizontal distribution of power, different forms of political institutions.

The comparativist's field of vision includes the problem of correlation of unitarianism, federalism, confederation with different types of political system and regimes. The US and the Soviet Union had a federal form of government, but America was ruled by a democratic system, while the USSR had an authoritarian model. Are there any correlations between the form of government and the type of political system? Comparative political science tries to answer this question.

A topical issue in political comparativism is the problem of development and political modernisation in Africa, Asia and Latin America. Modernisation is understood as the transformation from a traditional society to a transition society or from a modernising society to an industrial society. Modernisation presupposes certain types of political system necessary for different stages of political development.

Comparative studies of political behaviour have yielded significant results in studying changes in citizens' values. Previously, studies of political behaviour focused on the correlation between the development of industrial society and the changing values of the population. More recently, this field has expanded with an analysis of the process of changing values that accompanies the development of post-industrial society.

In this sense, Ronald Inglehart's idea of the movement of value orientations in the direction of post materialism is interesting. His interpretation of changes in the value system is based on two assumptions. In-

glehart suggests that priorities in society are formed in accordance with an orientation towards scarcity of something: people attach more value to what is relatively scarce in society. And second, Inglehart assumes that a person's own values and attitudes reflect the conditions under which they were socialised. The combination of these two attitudes creates a general model for the formation of value orientations: a person's basic value orientations are formed early in life as a response to the socio-economic conditions (personal and social) of that period and, once formed, these values remain unchanged.

Inglehart believes that the socio-economic conditions transforming Western industrial societies are also changing the value priorities of the population. People of the older generation emphasise the importance of material goals of society, such as economic welfare, public safety, law and order, religious values and strong national defence. The younger generation in Western countries looks to post-material goals – self-expression, personal freedom, social equality, self-realisation and maintaining quality of life [5.]

Another facet of the application of comparative political science is changes in the electoral process. Elections are a central element in the mechanism of representation of modern democracies. Changes in the relevance of factors influencing voter decisions are becoming one of the main themes of research on the electoral process. Political choice in most Western democracies has traditionally been determined by class, religious and other social factors. In the second edition of *Political Man*, Seymour Martin Lipset using comparative tools, showed the declining influence of voter class on voting outcomes in a number of Western democracies. Similar comparative studies have been conducted in Australia, Britain, Germany and Japan. The main conclusion of studies of the electoral process is that social position does not determine a person's political position. M. Franklin, using the example of 14 Western democracies, revealed a blurring of the rigid correlation of social structure with voting outcomes. M. Franklin's comparative analysis of the electoral process was sum-

marized by the following conclusion – practically in all the countries we studied the influence of social differentiation on a voter's choice is noticeable.

Also, comparative researchers have documented an increased influence of a candidate's image on Americans' voting decisions. Comparing a number of Western democracies, there is an increase in the personalisation of election campaigns in Western countries: photographs, interviews, meetings with people on the streets, and televised debates.

All these changes in the electoral process lead to an "individualisation of politics". Citizens try to figure out politics for themselves and make their own political decisions.

Comparative research has provided a unique opportunity to examine the process of establishing democratic party systems in Eastern Europe and Southeast Asia. New democracies explore their formation process, examining how sympathy for new parties is strengthened, how images of new parties are created, and how citizens learn to make choices and learn about representative democracy.

Types of comparative research

Comparisons are structurally different depending on the number of objects being compared, on the number of grounds on which objects are compared and on the nature of the relationships being revealed.

Plato does not compare ancient polities in general, but is interested in the forms of government. Gabriel Almond and Sidney Verba compare five nations, defining the domain of political culture for analysis. Maurice Duverger compares political parties and party systems, and Daniel J. Elazar concentrates on the modes of territorial organization, which is the basis for comparing different federal systems. Arend Lijphart explores the conditions for democracy in multicultural societies.

There are various typologies of comparisons. One of them is a typology of possible comparisons. The first type of such scholarly analysis is the morphological type of comparison. In this case, phenomena are compared according to structures and functions. An

example of morphological comparison is the comparison of "polities" with the help of the classical triad "monarchy – aristocracy – democracy". The next type is a substantive comparison, which compares not the forms but their content. Comparisons of this type are very popular in the study of Eastern, post-Soviet and similar systems. The mythological type of comparison is based on contrasting "antitheses". Examples of such comparisons are the categories Europe, West, Civilisation, etc. with their counterparts Asia, East, Barbarism, etc. Integral comparisons imply a comprehensive assessment of the nature and degree of influence of the geographical environment, economy, culture on political institutions. And the reverse impact of policies on these environments

Comparisons can be made on a small temporal scale. Comparisons are also made between similar events in political history. An evolutionary type of comparison is also made, i.e. political phenomena are compared with a certain stage of evolutionary development. The diffusive and genetic types of comparison, pseudomorphic and pseudo-substantial types are also distinguished.

Russian comparatist L. V. Smorgunov offers his typology of comparative studies, dividing them into "case-studies", binary regional, global and cross-temporal [6]. Soviet philosopher V. I. Barton distinguishes qualitative and quantitative comparison; incidental, deployed, universal and ideal forms of comparison; monorelative and polyrelative comparison [7].

Another facet of the problem field of comparative political science, the methodological peculiarity, according to Russian political scientist Mitrokhina T. N., is extrapolation of scientific knowledge, the essence of which consists in borrowing cognitive systems from other sciences [8]. This problem is also noted by the American political science researcher J. Jackson [9]. As a result of such borrowing of scientific knowledge, political science, political comparativism was enriched with cybernetic models and such technological terms as "process", "sys-

tem”, “element”, “feedback”. From economic theory, rational choice theory has been taken into political comparativism. From mathematics, Boolean algebra came to comparative political science, the essence of which is to analyse a large body of data on different countries by means of logical addition and multiplication operations. Factorial and correlation analyses were borrowed from statics, synergetics and systems analysis from the natural sciences. From psychology, psychometric methods as well as scale analysis, from sociology, sociometry, and from probability theory, sampling analysis of the general population. The extrapolative use of methodological techniques from other sciences makes it possible to extend the range of research into political phenomena.

The question of the identity of the content of the main categories is among the debatable issues discussed in comparativism. A theoretical concept formulated on the grounds of one political community, when transferred to another, ceases to work. For example, the classical definition of a political party as a voluntary mass organisation is inadequate when studying US political life. In Russia, where personified parties operate, this notion also undergoes adjustments. J. Lapalombara also notes that comparativists are uncomfortable with the fact that political terms carry different meanings in different contexts. This point is made by scholars of democratisation processes in former communist countries, where the term is associated with an anti-democratic system of comparison [10].

The Russian political scientist E. N. Moschelkov. He believes that the problem of incompatibility, non-identity of political science categories is caused by differences in philosophical and intellectual traditions in different countries. As an example, he cites the notion of “authoritarian – democratic” widely used in the political lexicon. In political encyclopaedias and dictionaries in the West, ‘authoritarian’ is interpreted as a social anomaly, as the antipode of democracy. In Russia, the interpretations of authoritarianism and democracy are different. Since

the birth of Russian statehood in the ninth and tenth centuries, authoritarian forms of government have existed in Russia. It was the authoritarian form of power which allowed the territorial integrity of the vast country to be maintained. Thanks to centralisation, Russia survived the most difficult periods of its history. The Russian authoritarian form of power ensured the stability of society [11].

Russian political scientist K. S. Gadzhiev also pays attention to the problem of the lack of identity of political terms in different countries. He notes that grass-roots democracy in Russia may have a different content, different parameters than in the US: “The impartation and institutionalization of democratic forms of political self-organization of society on this or that national soil cannot be reduced to mechanical transplantation of ready-made norms, principles and institutions of Western democracy” [12]. Democracy can be institutionalised on a particular national level if democratic values become the behavioural guidelines of the majority of the population. “It is easy to erect a statue of freedom and put it up in Tiananmen Square. But to live by these assumptions, these attitudes, is quite another matter” [13].

Another problem in comparative political science is the need to conduct research at the intersection of political comparativism proper, world politics and world relations. Political comparativism today faces new challenges, new demands. This implies the inclusion of supranational and transnational interactions into the sphere of analysis. According to A. Yu. Melville, “literally before our eyes a fundamentally new transnational political environment is forming, functioning as if “above” traditional nation states” [14]. New actors in world relations are emerging. These are transnational corporations (TNC), non-governmental organizations (NGOs), including international (INGOs), social, political and other movements, interest groups and individuals. These non-traditional actors in world politics are referred to as transnational actors (TNA). Non-traditional channels and instruments of transnational interac-

tions are emerging, including new information and communication technologies. Therefore, comparative political science is facing new dimensions of political processes and new research parameters.

In general comparative political science as a discipline has a growing tendency to separate into more or less self-sufficient groups, e.g. Europeanists, Latin Americans, Africanists, with little contact with each other. This is partly a consequence of growing specialisation, but also the result of increasing professionalism. Gabriel Almond has sadly remarked, albeit on the state of political science in general, that in political science groups are “tables” according to their ideological orientation (“right-wing” – “left-wing”) and methodology (“hard” – “soft” methods) (15). It is possible to imagine separate “tables” at which specialists by region with their particular European, Asian, Latin American or African cuisine are seated, and even within this framework there is a further division by scientific specialisation: those studying political parties dine separately from those studying public policy, those studying local government dine separately from those analysing electoral processes. The development of comparative political science has not only led to the isolation of regional specialists from one another, but within the same region there is also a trend towards greater self-sufficiency of fields of study, each with its own narrow network of links and its own set of academic journals. This all points to increasing fragmentation.

There is also a methodological debate in comparative political science around the benefits of comparing small numbers of cases (“small N”). A number of researchers emphasise the advantages of detailed, in-depth analysis of a small number of countries.

It is important to mention some of the particular problems that confront comparative political science. The first is whether states are still a meaningful unit of study. The absolute relevance of the country as a unit of analysis is questioned even without regard to the international context. Countries change, so temporal differences need to be borne in mind. If political institutions matter, then how can we com-

pare countries in which those very institutions are changing? Increasingly, researchers are having to abandon the unit of analysis as a country and isolate specific subclasses of variables. Arend Lijphart, for example, studies electoral systems and the political consequences of their functioning, rather than countries as such. This strategy is gaining acceptance, it suggests the possibility of experimenting with alternative units of analysis and creates the conditions for accounting for temporal differences [16].

One further challenge in comparative political science relates to the reliability of the measurement tools and indicators used to translate the findings from individual states into comparable operational categories. There are many examples where potentially erroneous or arbitrarily taken indicators have been given absolute status. For example, the indicators originally proposed by Lijphart as a means of elaborating his famous division of democracies into majoritarian (majority rule) and consensus (universal consent), which have subsequently been incorporated into many different studies. These indicators serve as the best means of distinguishing between the two types of democracy, they are not necessarily the only possible ones, it is necessary in any use to keep in mind the specific time period to which they have been applied. The disadvantage of comparative political science is that more attention is paid to the analysis of the relationship between variables than to the quality and reliability of those variables themselves. It is the scarcity of reliable comparable data that leads to the absolutization of those indicators that are available [16].

The current stage in the development of comparative political science is characterised by a collaboration of scholars with an interest in specific cases and contexts. For comparative studies, a clear limitation of the sphere on which the analysis will focus is essential. When examining the state apparatus, trade unions, women’s suffrage, the comparativist leaves out the contextual differences between countries. Context is often embedded in the subject and there-

fore requires special study. In political science, this kind of problem is called the Galton's problem.

One of the pressing problems of comparativism is to determine the parameters that lend themselves to comparison with one another. The objects of comparative analysis are political systems in their integrity, their forms, types and varieties. Political institutions, leadership institutions, legislatures, parties, electoral systems, mechanisms of political socialisation and culture are taken as objects of comparison.

Also among the cardinal questions of comparative political science are: what are the differences between the existing types of political systems with respect to their 'formative' function, how different types are established and how they are reinforced. It is generally accepted that the best system is democracy, so most comparative political research aims to study democracy: how to establish, maintain, adapt and improve it, as well as to counter threats to its existence.

Today, three new strands stand out in comparative studies: institutionalism, developmentalism (political and economic) and neo-institutionalism [17]. The first approach focuses on the specific mechanisms of the political system as such: presidential or parliamentary systems of government, unitary or federal polities, political parties and voting, commissions and elections. The second approach combines most theories of societal change. The third is a combination of the first two. The institutional approach forms the basis of comparative political science. Developmentalism, which calls itself the "new" comparative political science, focuses on the changes that occur in society rather than on the techniques of governance in politics, economics. And neo-institutionalism has returned the study of the functioning of the political system and states to the field of research.

By examining the political system, institutionalism sought to cover the whole range of problems: order and freedom of choice; individual and social interests; civil rights and duties; legislative and executive powers; the electoral system; the powers of courts and judges and

the advantages of written and unwritten constitutions, the advantages of a unitary state over a federal state, a parliamentary system over a presidential system; the evolution of local government, procedural rules of conduct in parliament, and political parties.

Institutionalism remains the mainstream approach in comparative political science. However, institutionalism proved unable to accept the undeniable divergence between institutionalist theory and practice when it came to establishing democratic systems in the newly independent states after the first and second world wars. It became clear that psychological, economic, social and organisational factors had to be studied beyond the institutional analysis. The democratic constitution of the Weimar Republic could not guarantee a functioning democracy. That is to say that institutionalism became inadequate when attempting to construct constitutions.

Developmentalism or "new" comparative political science with its emphasis on developmental problems emerged in the atmosphere of the post-war period. Two alternatives to development dominated comparative studies: modernisation theory and dependency theory. Modernisation theorists represented a group of comparative political science specialists, including Almond, Huntington, Apter, some of them combined individual case studies with broad-based analytical work on the comparative study of development processes. The proponents of the dependency theory include economists P. Baran, political scientists G. Kitching and C. Lees. For those in the first group, the formula "decolonisation plus growth plus democratisation" was a legitimate strategy for independence. The second group opted for a strategy of hegemony and domination. As a result, researchers using the same material from the same countries could come to completely opposite conclusions.

The criticism of modernisation theory and dependency theory has been that both theories treat politics as a reflection of economics or societal processes.

Neo-institutionalism combines the former institutionalism with development theories. Neo-

institutionalism analyses political behaviour, including electoral behaviour, the dynamics of success and failure of political parties, their significance for the state, problems of elites and democratisation.

The object of comparative research has been political parties, their functioning, bloc building, changing people's attitudes, and the role of elites, bureaucracies and politicians in different political regimes. While developmentalists stressed the need for economic growth as a condition for democracy, neo-institutionalism explored the challenges posed to the government by the negative consequences of growth, including environmental, adaptation of immigrants. After the collapse of the Soviet Union, phenomena such as separatism and religious sectarianism and fundamentalism intensified, none of which were predicted or could be explained by theories of social change [17].

Neo-institutionalism is receptive to economic analysis, for it deals with financial and monetary policy, banks, markets, globalisation. It also examines changes in the legislative process, shifts in party politics. Neo-institutionalism, compared to institutionalism, is more concerned with social and political theory as well as with political economy.

In comparative political science the search for suitable methods, units of comparison for data collection and processing, compilation of working hypotheses, and development of new techniques continues. Discussions continue around what is better: "small number of examples", detailed description of a single case, what are the advantages and disadvantages of big theories. In any case, comparative analysis makes political science more sensitive to the diversity of norms, values, institutions and social structures and to the interconnectedness of different forms of political behaviour.

Comparative study of modernisations. There have been two major projects in global comparativism. The first one is connected with large-scale comparisons of modern democratic polities. This is first of all a study of 114 polities by Robert A. Dahl. And the study by

Tatu Vanhanen – 119 countries in 1984, 147 in 1990 and 172 in 1997. Lijphart made a stricter comparison of democracies: 21 in 1984 and 32 in 1999.

The second set, this Stanford project, is the book *Crisis, Choice and Change. Historical Studies of Political Development*, published in 1973. This collection includes articles analysing eight historical incidents of qualitative political change. The authors took turning points and tried to use mathematical tools to formalise the balance of political power as it developed in each of these mishaps.

Powell analysed the events surrounding the 1832 Reform Act in Britain, Cavan the crisis of 1931 in Britain, Mundt the establishment of the Third Republic in France, Rittberger the formation of the Weimar Republic, White the Meiji Restoration in Japan, and applications that quantified with a single mathematical tool the dynamics of political coalition building. The main achievement of the study is an update of the comparative methodology. Through such parameters of comparison "statics-dynamics", "determination-choice", the group participants were able to achieve a synthesis of deductive (generative) and inductive (taxonomic) comparison strategies.

Ideal-typical frameworks are used as comparisons. The basic unit of comparison is the constitution as the stable framework of a particular polity. The following can be used as the main parameters of comparison: configuration of the functional division of sovereign power; configuration of the territorial division of sovereign power; configuration of the substantive (corporate, communal, consociational) division of power.

Configuration of mediation structures between individuals (subjects, citizens) and locus(s) of sovereign power, including electoral systems and elections, party systems.

An additional unit of comparison is the regime as the mode of organisation of power in a particular polity embedded in the constitution and filling it. The following schemes can be used as comparison parameters: the realisation of the functional division of sov-

ereign power; the realisation of the territorial division of sovereign power; the realisation of the substantive (corporate, communal, consociational) division of sovereign power; the relationship between the ruling locus of regime and opposition (opposition), including forms of political participation of individuals, their politically organised groups and other non-sovereign actors; legitimation and delegitimation of the actual regime and the virtual regimes of opposition.

Comparative research is today an objective need, a necessary and living reality. Comparative analysis allows to understand political practice in different countries, to make political forecasts, helps to identify valuable experiences and to take into account the negative aspects and inefficiencies of one or another political decision. Comparative research allows us to go beyond the boundaries of a particular country, to make broader scientific generalisations. They provide an opportunity to test hypotheses on a broader material, as well as to share experiences with representatives of other countries. Comparative political research is a means and manifestation of international cooperation in political science, contributes to global consensus building, and is a powerful universal tool that enhances the ability to understand other countries' political processes and assess one's own axioms.

In the words of Ronald H. Chilcote: "Comparative political science is not a settled field and old and new ideas continue to impact on its evolution. This diversity not only permits controversy and debate, but also keeps open a rich dialogue on issues and permits both scholar and student to delve into previously unexplored questions or to challenge and reconsider established assumptions on a rapidly changing and evolving world" [18].

Already since the late 1960s comparative political science has been increasingly influenced by new methodological orientations associated with a renewed interest in political philosophy and a critique of the rational foundations of science. Around this time, a critique of behaviouralism unfolds. Several grounds for this criticism can be identified. Firstly,

political science in general and comparative political science in particular proved to be immune to the new social and political changes that emerged so violently in the late 1960s and early 1970s in the form of countercultural youth movements. Secondly, the attempt to create, on the basis of behavioralism and structural functionalism, a political science devoid of values actually led to the dominance of only one theoretical paradigm, associated with the ideology of "bourgeois liberalism". Thirdly, it turned out that the behavioural and structural-functional methodologies of comparative analysis, oriented towards the search for patterns and similarities, actually led to a picture of the political world that was stripped of much of its uniqueness and diversity. Fourthly, the predominance of quantitative methods of analysis in comparative political science, while creating an opportunity for hypothesis testing, also impoverished it. In fact, by means of statistical testing, either rather trivial truths or already known dependencies were often asserted. Fifth, although comparative political science included Asian, African and Latin American countries in its field of vision, the teleological concept of dependent development was protested by Western comparativists and non-Western scholars alike.

The resurgence of interest in political theory and philosophy was bound to have an impact on the state of empirically oriented comparative political science. Some scholars have even spoken of a crisis of this science. However, while agreeing with the critique of empirically oriented comparative political science, there seems to be some transformation of methodological research models and a shift of interest from looking for similarities and common dependencies to showing differences and creating new and more diverse classifications.

In the 1970s, comparative political science once again faced the challenge of renewal. Although Gabriel Almond said that the crisis in comparative political science was political rather than intellectual, the discipline began to change both methodologically and substantively [19]. The topic of comparative

studies is characterized by a shift from studying traditional institutions and factors of political activity (state, parties, elections, media) to comprehending new phenomena (environment of politics, group interests and neo-corporatism, new mass movements, post-material values, ethnic, linguistic, age and gender factors). Particular importance is attached to research into how policy is shaped and how old and new institutions and factors influence it. An entire independent subfield of comparative public policy is emerging.

There have been and are major changes in methodology. Perhaps it is these changes that make one speak of crisis trends in comparative political science. First of all, this has to do with a reassessment of the importance of behaviouralism and structural functionalism. It is no coincidence that attacks on these methodological approaches are still going on. At the same time, one can name the following main trends that characterise the process of methodological transformation of comparative political science.

The first trend can be labelled as *radical*. It is most clearly represented in post-modern and feminist political theoretical orientations. Postmodernism and feminism differ in their approach to the critique of contemporary scientific cognition and understanding of politics. But the core of this critique is the same: a radical break with the dominance in cognition by one style, let's call it "rational-scientific" or "masculine." Although these radical orientations are reflected primarily in political theory and philosophy, but their influence is becoming increasingly visible in the methodology of political and, importantly for the topic of this article, postmodernism and feminism problematize issues of theory and method in comparative political science.

Let us note just a few points that are important for comparative political science. Political science post-modernity has problematised comparative political science itself, as it has questioned the very possibility of a true result of cognition based on a consensus on the similarity of the structures and functions of the

real political world. "The methodologies proposed by Derrida, Foucault and Lyotard (deconstruction, genealogy and paralogy, respectively) are conceived, in general, to decentralise the production of language and truth to more accurately reflect the contingent and relative nature of cognition. Society contains a plurality of heteromorphic languages. Genealogical analysis reveals that history has been a struggle between these languages". By criticising rationalism and rational models of democracy, postmodernism lays the foundations for a pluralism of methodological and theoretical orientations. However, there is a de facto return to configurative research, which was one of the main points on which the transition from "traditional" to "new" comparativism was built.

In comparative political science, the feminist wave is reflected in studies on women in different Scandinavian democracies, citizenship and political participation, public policy and the welfare state. Feminist comparative political science is emerging as an independent field with its own centres, journals and specialists.

The second trend is related to the restoration of the importance of *historical-comparative* methodology, most clearly manifested primarily in a modern reading of K. Marx and M. Weber. Although Marx and Weber are antagonists in questions of social regularities, both methodological traditions allowed during this period, on the one hand, to resist the narrowness of empirical and quantitative comparison methodology and, on the other, to enhance the role of social and socio-cultural explanatory factors (economic and social structures, religion, ethnicity, culture).

As early as the 1960s, a number of scholars began to actively use the methodology of political comparison of M. Weber and K. Marx. Weber's followers include S. Eisenstadt, R. Bendix and G. Roth. The former, using Weber's concept of 'dominance' and bureaucracy, conducted a comparative analysis of imperial forms of government as early as the 1960s, and later of clientelist relations in politics, not

to mention larger comparativist projects. R. Bendix, studying the development of nation-states in Western Europe, Russia, Japan and India, drew on Weber's notions of rationality and traditionality, patrimonialism, bureaucratization and plebiscitary democracy [20]. G. Roth attached particular importance to the concept of patrimonialism in the comparative analysis of political development in the third world.

In the 1960s and 1980s, there was a renewed interest in the Marxist concept of classes, class struggle, property, type of production as explanatory factors of political development, revolutions and the formation of states. Thus B. Moore was one of the first to use the concepts of bourgeois and agricultural social structures to explain the emergence of capitalist democracy, fascism and communism. T. Skocpol applied the concepts of social structure and conflict to explain the revolutions in France, Russia and China.

At the same time, studies devoted to the methodological problems of comparison in M. Weber and K. Marx appeared in the early 70s. Of particular importance is a fundamental work edited by I. Valier in 1971, *Comparative Methods in Sociology*, in which large chapters are devoted to K. Marx and M. Weber. Substantial attempts to integrate the Marxist tradition into political comparativism were made by P. Calvert and R. Chilcott.

Weber's approach is now characterised as a comparative-historical methodology, combining positivism and neo-Kantianism. Kahlberg, in his recent work on Weber and his method of comparison, sees the specificity of Weber's methodology, firstly, in the interpretive understanding of social action, which includes both objective and subjective components; secondly, in the concept of ideal types, which removes the opposition of interpretative theory and positivism; thirdly, in the concept of multicausality of explaining political and social phenomena. He emphasises that 'Weber speaks of a level of analysis that differs from the exclusive focus, on the one hand, on solitary and self-interested individuals, and, on the other hand, on global generalisations of "soci-

ety", on organic "systems" and a simple orientation towards norms. By doing so, he turns his attention to the unification of subjective meaning and individual action with distinctly social orientations".

The third trend can be defined as *renewalist*. It has to do with expanding the methodological tools of scientific comparative analysis by turning to new conceptual approaches that allow the use and development of a well-established set of tools for statistical analysis while resolving the problem of the unity between quantitative and qualitative research. This trend is not alien to the use of everything positive that has been manifested in the radical and historical-comparative orientations. Among recent works of this trend we should mention the collections edited by H. Viarda "New Directions in Comparative Politics" and H. Keman, J.-E. Lane and S. Ersson "Comparative Politics: Introduction and New Approaches", G. Sartori "Comparative Constitutional Engineering. An Inquiry Into Structures, Incentives, and Outcomes", P. Pennings, H. Keman and J.J. Kleinijenhuis "Doing Research in Political Science: An Introduction to Comparative Methods and Statistics", G. Peters, "Comparative Politics. Theory and Methods". However, for the sake of greater rigour, attention will be drawn here to the renewal trend's own significance.

Firstly, structural functionalism has been criticised for its formality and its inability to answer the question of why states and political systems differ in the implementation of their functions. In this regard, Henry Toone wrote: "What established itself as a theory – structural-functional theory, or Parsons' theory – was merely a set of categories for ordering experience. Human needs as defined by Maslow, for example, served the political purposes of the welfare state rather than those of research explanation. Today, after such attention to them, they are hardly used". Hence there was an increased interest in theoretical models that would define comparative research from the outset. The role of theory in formulating hypotheses, in making comparisons and in

interpreting empirical data has increased considerably. Theory becomes the goal of comparative analysis rather than an instrumental value for comparison. The term 'theory', writes Stefan Nowak in this regard, should refer to 'a possibly unambiguous set or systems of laws, or broad law-like generalisations, united on the basis of a common unifying principle, with clearly detectable topologies and/or historical conditions of their validity'.

Secondly, much of the new understanding in theory is defined by the controversy surrounding the problem of the nation-state as the basic unit of comparative analysis. Although the comparative method differs from the statistical method, these differences were often treated as quantitative, of the 'few cases, many variables' type. Correlations between variables were seen as sufficient to test hypotheses about the causality of relationships between factors. Of course, the need to accompany quantitative data with a qualitative interpretation was mentioned, but this was seen as an additional condition of the study. The plethora of data presented in the 1960s and 1970s, using sophisticated mathematical techniques, did raise questions. And one of the main ones: could a single country or nation state be considered as independent units of analysis? As a solution to this problem, the so-called "holistic approach" began to take shape, which was interpreted differently in studies by such scholars as L. Silverman, A. Przeworski, G. Thunet, S. Anttila. "Holistic approach" implies the consideration of different spatial entities (i.e. nation-states) as some interrelated parts of the whole described by the theory [21].

Thirdly, the critical engagement with comparative macro-level studies revealed two main trends in addressing theoretical and methodological and technical-methodological problems. On the one hand, it was argued that macro theory oversimplified social reality and might even be based on false as-

sumptions. This meant that research did not receive a theoretical model that would adequately reproduce reality. The solution was seen as an emphasis on the quality of data, on the complexity and uniqueness of macro-political events and on a return to history (i.e. to "real" time, place and people). On the other hand, criticism of the comparative-historical tendency in political science and political sociology for its denial of general theory and desire for uniqueness led to attempts to create new theoretical models that would combine empirical (including quantitative) analysis with broad generalisations of causal relations. The second orientation has resulted in models of rational choice, game theory, neo-institutionalism and political network theory borrowed from economic and sociological doctrines.

Of course, the discussion of problems of comparative political science today, in the 21st century, is not entirely confined to radical, comparative-historical and renewalist tendencies. Other, more private or more traditional studies can also be noted. Therefore, the use of mathematical methods of analysis is improving and expanding (e.g., new for comparative political science use of Boolean algebra and interest in the logic of fuzzy sets), increasing importance of methods of comparison of the most similar and most dissimilar systems, special attention is paid to the problem of equivalence in comparison, the role of such variable as "time" increases, etc. We should also note the changes in the subject matter of comparative political science. Transition processes, conflicts, regional integration, political discourse, new political identity, political finance, corruption, democratic audit, etc. are coming into focus at this stage, with democratisation and transitology being relatively independent areas. On the whole, one can hardly speak of a decline in interest in comparative political science, we can only note a serious restructuring of its methodology and topics.

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EXAM PRESSURE AND MOTIVATION AND LIFE SATISFACTION AMONG ADOLESCENTS

Abstract

Objective: This study aims to compare the exam-related pressure and motivation and life satisfaction among adolescents between China and the United States.

Methods: This study used data from the 2015 Programme for International Student Assessment (PISA). PISA is the survey of adolescent students as well as their parents and schools around the world. Logistic regression analysis and artificial neural network are applied. ROC curves and Area Under the Curve (AUC) are estimated.

Results: logistic regression showed that U.S. students are 1.137 times more likely to feel satisfied than Chinese students; exam-related pressure variables are associated with lower life satisfaction ($OR < 1$), while exam-related motivation variables are associated with students' higher life satisfaction ($OR > 1$). Artificial neural network also showed that the variables of country, exam-related pressure and motivations affect students' life satisfaction.

Conclusion: Data from this international survey revealed that students in the U.S. have higher life satisfaction than students from China. Exam-related pressure decrease life satisfaction while exam-related motivation increases life satisfaction.

Keywords: exam-related pressure and motivation; logistic regression analysis; artificial neural network.

1. Study objectives

This study aims to compare the exam-related pressure and motivation and life satisfaction among adolescents between China and the United States.

2. Materials and Methods

2.1. Data source

This study used data from the 2015 Programme for International Student Assessment (PISA, website: <http://www.oecd.org/pisa/>) [1]. PISA is the survey of adolescent students as well as their parents and schools around the world, conducted by the Organization for Economic Co-operation and Development (OECD). It is conducted every three years to tests 15-year-old students in reading, mathematics and science. PISA choose the age of 15 because it is believed that students at this age

can decide whether or not they want to continue their education.

The 2015 data is the most recent available PISA data by the time of this study. It (<http://www.oecd.org/pisa/data/2015database/>) includes five main data files: a student-questionnaire data file, a school-questionnaire data file, a teacher-questionnaire data file, a cognitive item data file and a file with questionnaire timing data. We used the student data.

2.2 Variables

2.2.1 outcome: life satisfaction

Students were asked "Overall, how satisfied are you with your life as a whole these days?"

Responses ranged from 0 to 10.

2.2.2 Exam-related pressure and motivation

Table 1.

	question	variable name
Exam-related pressure	I often worry that it will be difficult for me taking a test.	worry_difficult
	I worry that I will get poor <grades> at school	worry_poor_perform
	Even if I am well prepared for a test I feel very anxious	anxious
	I get very tense when I study for a test.	tense
	I get nervous when I don't know how to solve a task at school.	nervous
Exam-related motivation	I want top grades in most or all of my courses.	want_top_grade
	I want to be able to select from among the best opportunities available when I graduate.	want_opportunity
	I want to be the best, whatever I do.	want_best
	I see myself as an ambitious person.	ambitious
	I want to be one of the best students in my class	want_best

Response options were: strongly disagree, disagree, agree, strongly agree.

2.2.3 Other variables:

Students' age and gender are included in the logistic model. These are variables that may affect the outcome, therefore, by including them in the model, their potential confounding effect can be controlled.

2.3 data analysis

Logistic regression analysis and artificial neural network are applied.

Logistic Regression Modeling is a popular analytic technique to analyze the association between a set of predictors and a binary outcome. In this study, the outcome is "having higher life satisfaction".

The general formula of logistic regression is: $\ln(\text{odds of an event occurring}) = \ln\left(\frac{P}{P-1}\right) = \beta + \beta_1 \cdot X_1 + \beta_2 \cdot X_2 + \dots + \beta_n \cdot X_n$. P is the probability of an event, which is convertible with odds. X_n is a predictor variable, and β_n is a regression coefficient. The relationship between the odds ratio and the coefficients is $OR = e^\beta$.

- If the coefficient β of a variable X_n is larger than 0, is related to a higher odds/probability of the event. The odds ratio related to X_n is above 1 in this case.
- If the coefficient of a variable X_n is equal to 0, X_n is not related to the event. The odds ratio related to is equal to 1 in this case.
- If the coefficient of a variable X_n is smaller than 0, X_n is related to a lower odds/probability of the event. The odds ratio related to X_n is below 1 in this case.

An artificial neural network (ANN), often just called a "neural network" (NN), is a mathematical model or computational model based on biological neural networks, in other words, is an emulation of biological neural system. It consists of an interconnected group of artificial neurons and processes information using a connectionist approach to computation. In more practical terms neural networks are non-linear statistical data modeling tools. ANN is widely used these days to model complex

relationships between inputs and outputs or to find patterns in data. This model was done using R software ‘neuralnet’ package.

In order to assess how well a model performs, a ROC curve is generated which is a measure of classifier performance [2]. It is a graphic that shows the diagnostic ability of a model in predicting binary outcome as its discrimination threshold is varied. Ultimately, the focus is the area under the ROC curve, or AUROC. AUROC ranges from 0.50 to 1.00, and the higher AUROC, the better the model is. It should be noted, however, that in this study, the purpose is to compare which model has a higher AUROC, instead of the absolute values of AUROC.

4. Results

There are 11.065 participants with complete information of the variables, including 7946 from China and 3119 from the USA.

Student gender distribution	
boys	49.8%
girls	50.2%

Student gender distribution

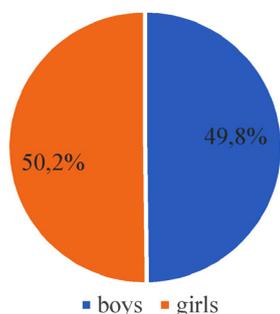


Figure 1.

Boys are more likely to have higher life satisfaction.

% of high life satisfaction	
boys	52.1%
girls	48.0%

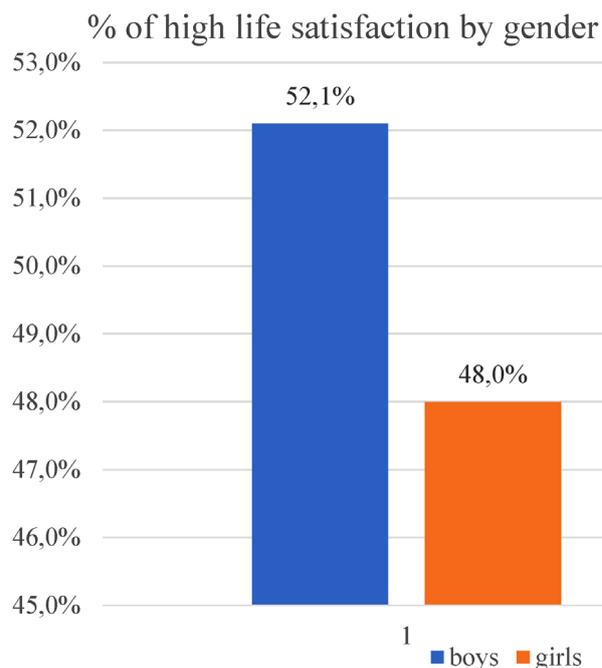


Figure 2.

Students in the U.S. have higher proportion of high life satisfaction.

% of high life satisfaction	
China	48.0%
USA	55.9%

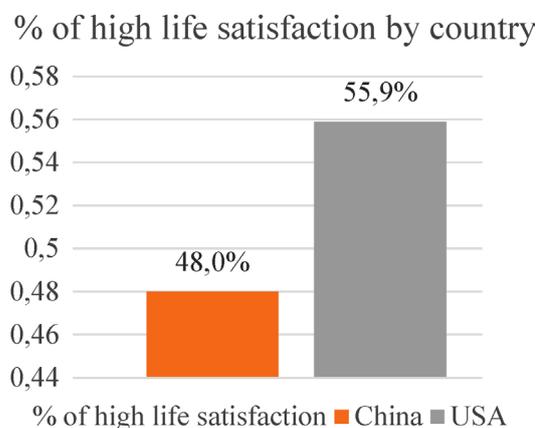


Figure 3.

Results from Logistic Regression

Table 2.

Odds Ratios from Logistic Regression modeling					
	P value		Odds Ratio	Lower CI	Upper CI
1	2	3	4	5	6
student gender: male vs female	0.163		1.057	0.977	1.143

1	2	3	4	5	6
age	0.491		0.95	0.821	1.099
worry difficult	0.003	**	0.907	0.849	0.969
worry poor perform	<0.001	***	0.822	0.771	0.875
anxious	0.292		0.966	0.906	1.03
tense	0.207		0.959	0.9	1.022
nervous	<0.001	***	0.833	0.787	0.881
want top grade	0.011	*	1.091	1.019	1.167
want opportunity	0.532		0.973	0.893	1.059
want best	0.001	**	1.119	1.046	1.198
ambitious	<0.001	***	1.342	1.261	1.428
USA	0.036	*	1.137	1.008	1.282

From the table, exam pressure variables are associated with lower life satisfaction (OR < 1), while

e.g., a student who worries about difficulty of the exam is 90.7% times as likely as a student not reporting worrying to have high life satisfaction.

Exam motivation variables are significantly associated with students' higher life satisfaction (OR > 1).

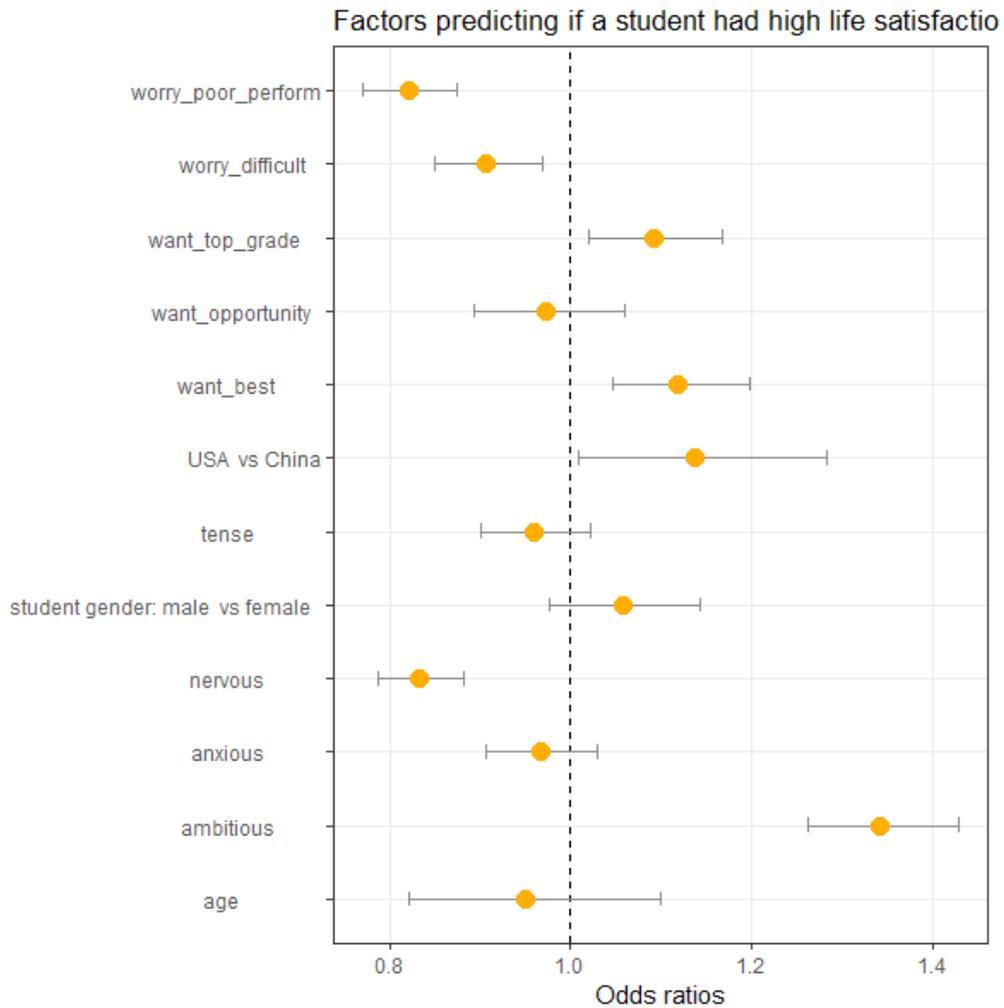


Figure 4.

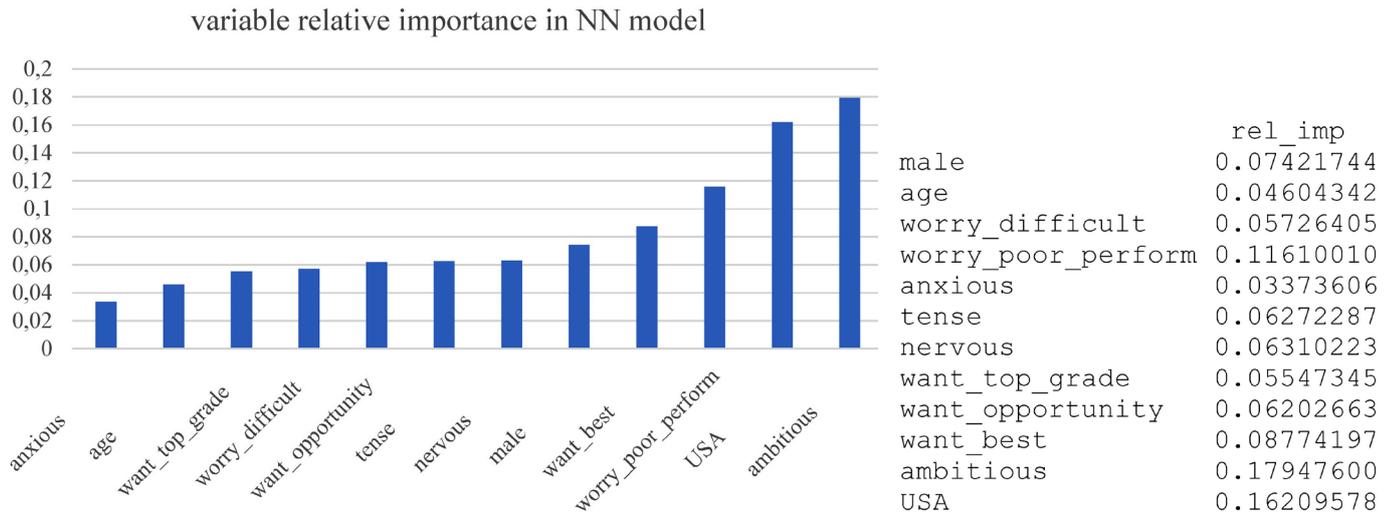


Figure 7.

Variable importance from the NN model is listed. The relative importance of a specific explanatory variable can be determined by identifying all weighted connections between the nodes of interest. It can be interpreted as the strength of association between an explanatory variable and the response variable. The number indicates relative importance with the absolute magnitude from zero to one [3].

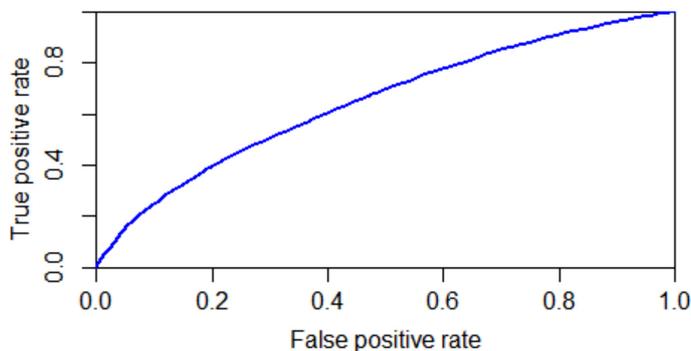


Figure 8. Neural Network model: ROC Curve: AUC = 65%

From the model, it can be seen that “ambition”, “USA (country)” and “worry_poor_perform” are

some of the most important factors associated with students’ interest in science study. AUC is 65% for the NN model.

4. Interpretation of results

Boys have higher life satisfaction than girls.

Students in the U.S.A have higher life satisfaction than students in China.

Both Logistic regression and Neural Network modeling revealed that exam-related pressure and motivation are associated with students’ life satisfaction.

Exam-related pressure decreases life satisfaction, while exam-related motivation increases life satisfaction.

5. Conclusion

Data from this international survey revealed that students in the U.S.A have higher life satisfaction than students in China. Both Logistic regression and Neural Network modeling revealed that exam-related pressure and motivation are associated with students’ life satisfaction.

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Section 6. Psychology

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PREDICTING THE RISK OF ADHA AMONG CHILDREN

Abstract

Objective: This study aims to 1) examine the predictors of ADHA 2) build a predictive model for ADHA using logistic regression model.

Methods: 2017 National Survey of Children's Health data was used for this study. The National Survey of Children's Health (NSCH) is being conducted by the U. S. Census Bureau for the U. S. Department of Health and Human Services' (HHS) Health Resources and Services Administration's (HRSA) Maternal and Child Health Bureau (MCHB). It is designed to provide national and state-level information about the physical and emotional health and wellbeing of children under the age of 18 living in mailable residential housing units in the United States, their families and their communities, as well as information about the prevalence and impact of children with special health care needs.

All the participants who were eligible were randomly assigned into 2 groups: training sample and testing sample. A logistic regression model was built using training sample. Receiver operating characteristic (ROC) was calculated.

Results: About 9.38% of 19019 children had ADHA, about 12.31% among 9777 male children and 6.28% among 9242 female children.

According to the logistic regression, children born in the USA were less likely to have ADHD (OR=0.445). When the first adult had higher completed year of school, the children were more likely to have ADHA (OR=1.046). When the first adult had worse mental health, the children were more likely to have ADHA (OR=1.111).

When children's age increased by 1 year, the children were more likely to have ADHD (OR=1.12). Female children were less likely to have ADHD (OR=0.419). Children with normal birth weight has less likelihood to have ADHD (OR=0.619).

Children in a family which is hard to cover basics like food or housing were more likely to have ADHD (OR=1.301). Children who experienced parent or guardian divorced were less likely to have ADHD (OR=0.772). Children who had parent or guardian spent time in jail were less likely to have ADHD (OR=0.680). Children who were victims of violence were less likely to have ADHD (OR=0.638). Children who lived with mentally ill were less likely to have ADHD (OR=0.656).

The area under curve was 0.764. The optional cutoff time is 0.648. The mis-classification error was 0.095. The sensitivity rate is about 0.6% and the specificity is 99.9%.

Conclusions: In this study, we identified important predictors of ADHD among children, for example children age, sex, mental health of adults.

Keywords: ADHD, predictive model, logistic regression, ROC, odds ratio.

1. Introduction

The estimated number of children ever diagnosed with ADHD, according to a national 2016 parent survey, is 6.1 million (9.4%). This number includes: 388,000 children aged 2–5 years; 4 million children aged 6–11 years; 3 million children aged 12–17 years. Boys are more likely to be diagnosed with ADHD than girls (12.9% compared to 5.6%). [1] According to a national 2016 parent survey, 1 in 6 children with ADHD had at least one other mental, emotional, or behavioral disorder [2].

In this study, we aim to 1) examine the predictors of having ADHA at high school; 2) build a predictive model for having ADHA using logistic regression model.

2. Data and Methods:

Data:

2017 National Survey of Children's Health data was used for this study. The National Survey of Children's Health (NSCH) is being conducted by the U.S. Census Bureau for the U.S. Department of Health and Human Services' (HHS) Health Resources and Services Administration's (HRSA) Maternal and Child Health Bureau (MCHB). It is designed to provide national and state-level information about the physical and emotional health and wellbeing of children under the age of 18 living in mailable residential housing units in the United States, their families and their communities, as well as information about the prevalence and impact of children with special health care needs.

Models:

We also used logistic regression models to calculate the predicted risk. Logistic regression is a part of a category of statistical models called generalized linear models, and it allows one to predict a discrete outcome from a set of variables that may be continuous, discrete, dichotomous, or a combi-

nation of these. Typically, the dependent variable is dichotomous and the independent variables are either categorical or continuous.

The logistic regression model can be expressed with the formula:

$$\ln(P/1 - P) = \beta_0 + \beta_1 * X_1 + \beta_2 * X_2 + \dots + \beta_n * X_n$$

Model evaluation:

The discriminatory ability – the capacity of the model to separate cases from non-cases, with 1.0 and 0.5 meaning perfect and random discrimination, respectively – was determined using receiver operating characteristic (ROC) curve analysis. ROC curves are commonly used to summarize the diagnostic accuracy of risk models and to assess the improvements made to such models that are gained from adding other risk factors. Sensitivity, specificity, and accuracy will be also calculated and compared. For all these measures, there exist statistical tests to determine whether one model exceeds another in discrimination ability.

Optimal Cutoff for Binary Classification maximizes the accuracy.

Mis-Classification Error is the proportion of all events that were incorrectly classified, for a given probability cutoff score.

Sensitivity: probability that a test result will be positive when the disease is present (true positive rate).

Specificity: probability that a test result will be negative when the disease is not present (true negative rate, expressed as a percentage).

Variables:

3. Results

About 9.38% of 19019 children had ADHA, about 12.31% among 9777 male children and 6.28% among 9242 female children.

Basically, a corrgram is a graphical representation of the cells of a matrix of correlations. The idea is to display the pattern of correlations in terms of their signs and

magnitudes using visual thinning and correlation-based variable ordering. Moreover, the cells of the matrix can be shaded or colored to show the correlation value. The

positive correlations are shown in blue, while the negative correlations are shown in red; the darker the hue, the greater the magnitude of the correlation.

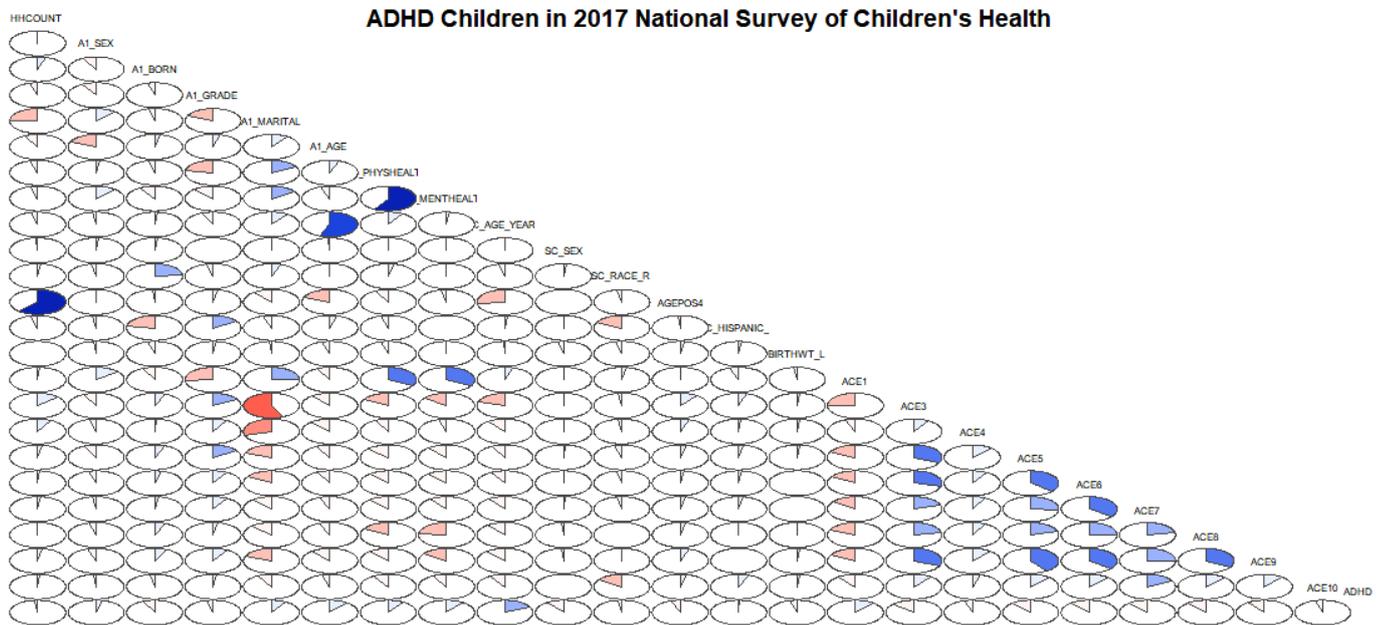


Figure 1. Matrix of correlations between variables

According to the logistic regression, children born outside of the USA were less likely to have ADHD (OR=0.445). When the first adult had higher completed year of school, the children were more likely to have ADHA (OR=1.046). When the first adult had worse mental health, the children were more likely to have ADHA (OR=1.111).

When children’s age increased by 1 year, the children were more likely to have ADHD (OR=1.12). Female children were less likely to have ADHD (OR=0.419). Children with normal birth weight has less likelihood to have ADHD (OR=0.619).

Children in a family which is hard to Cover Basics Like Food or Housing were more likely to have ADHD (OR=1.301). Children who experienced adults Slap, Hit, Kick, Punch Others less likely to have ADHD (OR=0.772). Children who had Parent or Guardian spent Time in Jail were less likely to have ADHD (OR=0.680). Children who were victims of violence were less likely to have ADHD (OR=0.638). Children who lived with mentally ill were less likely to have ADHD (OR=0.656).

Table 2. – Logistic Regression

(Intercept)	1.544	0.833	1.852	0.064	.
HHCOUNT	0.022	0.044	0.505	0.614	
A1_SEX	0.151	0.086	1.755	0.079	.
A1_BORN	-0.809	0.162	-5.001	0.000	***
A1_GRADE	0.045	0.022	2.008	0.045	*
A1_MARITAL	0.016	0.036	0.454	0.650	
A1_AGE	0.007	0.005	1.466	0.143	
A1_PHYSHEALTH	0.062	0.053	1.171	0.241	

A1_MENTHEALTH	0.105	0.052	1.996	0.046	*
SC_AGE_YEARS	0.113	0.010	11.510	< 2e-16	***
SC_SEX	-0.871	0.080	-10.922	< 2e-16	***
SC_RACE_R	-0.038	0.023	-1.673	0.094	.
AGEPOS4	0.007	0.053	0.133	0.894	
SC_HISPANIC_R	-0.082	0.127	-0.644	0.520	
BIRTHWT_L	-0.480	0.123	-3.913	0.000	***
ACE1	0.263	0.046	5.710	0.000	***
ACE3	-0.259	0.102	-2.547	0.011	*
ACE4	-0.132	0.186	-0.708	0.479	
ACE5	-0.386	0.140	-2.765	0.006	**
ACE6	-0.263	0.153	-1.723	0.085	.
ACE7	-0.450	0.158	-2.850	0.004	**
ACE8	-0.422	0.117	-3.605	0.000	***
ACE9	0.013	0.128	0.103	0.918	
ACE10	-0.019	0.191	-0.102	0.919	

Odds Ratio Figure:

Odds Ratio

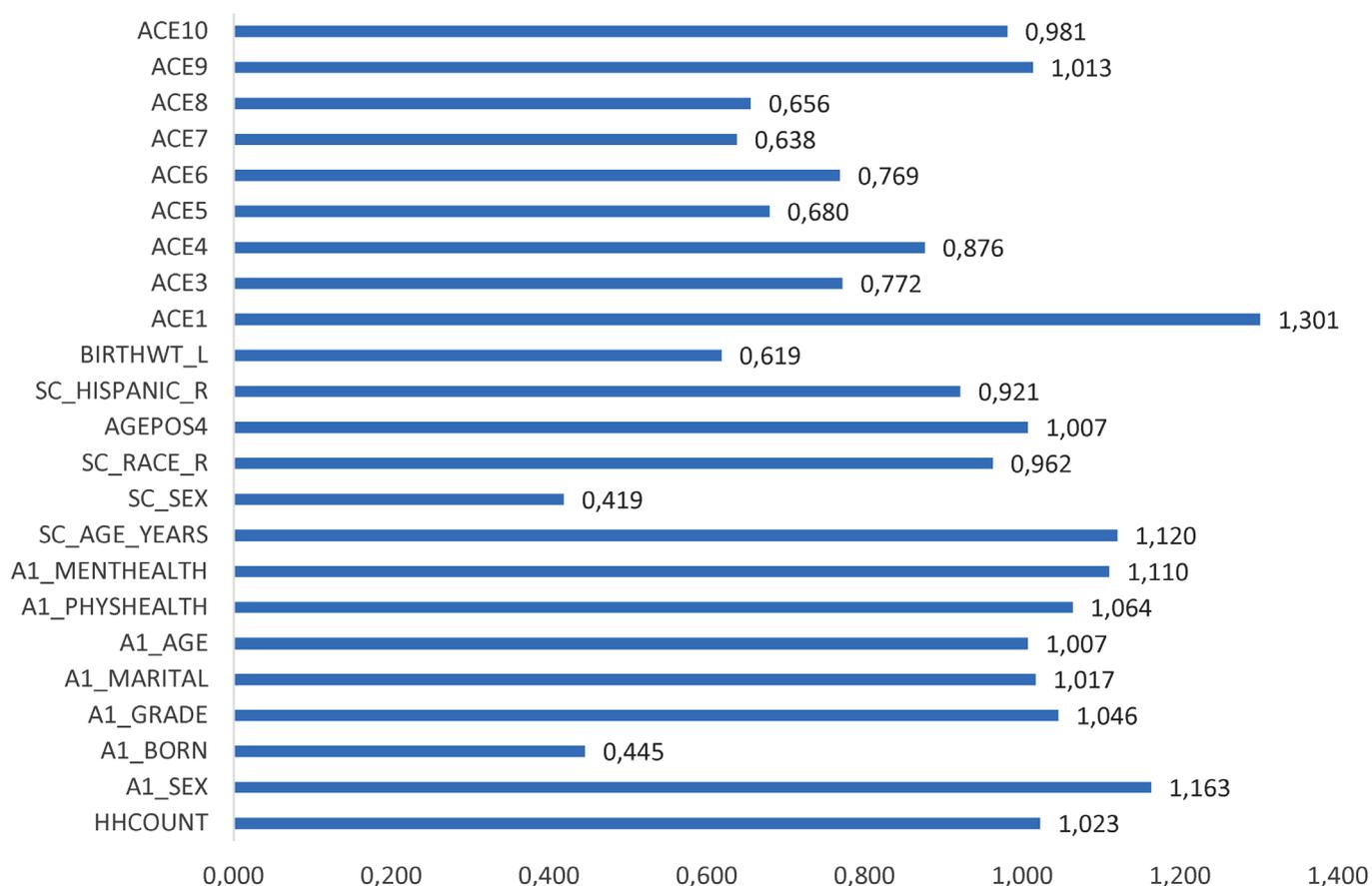


Figure 2. Odds Ratio

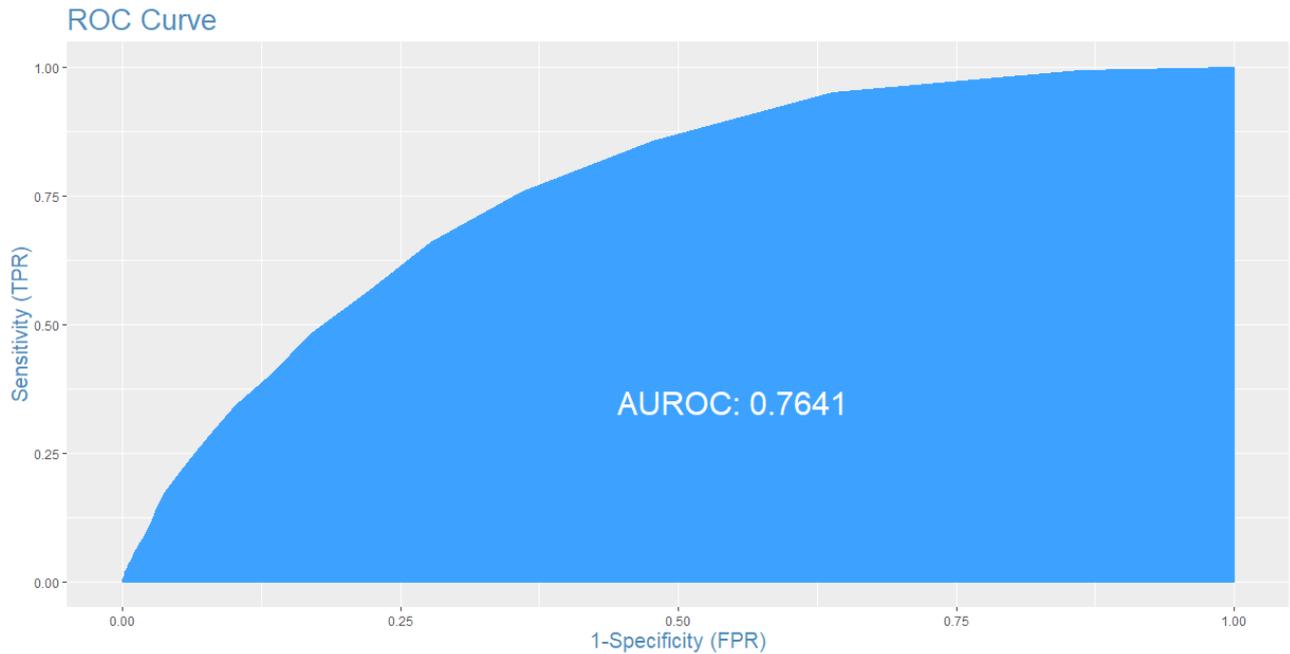


Figure 3. ROC in testing sample for Logistic Regression

The area under curve was 0.764. The optional cutoff time is 0.648. The mis-classification error was 0.095. The sensitivity rate is about 0.6% and the specificity is 99.9%.

Table 3.

Cut-off	sensitivity	specificity
0.3	12.12%	97.37%
0.5	2.42%	99.6%
0.7	0.3%	99.98%

4. Discussions

About 9.38% of 19019 children had ADHA, about 12.31% among 9777 male children and 6.28% among 9242 female children.

According to the logistic regression, children born in the USA were less likely to have ADHD (OR=0.445). When the first adult had higher completed year of school, the children were more likely to have ADHA (OR=1.046). When the first adult had worse mental health, the children were more likely to have ADHA (OR=1.111).

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The area under curve was 0.764. The optional cutoff time is 0.648. The mis-classification error was 0.095. The sensitivity rate is about 0.6% and the specificity is 99.9%.

Evidence suggests that the prevalence of attention-deficit hyperactivity disorder (ADHD), or

hyperkinetic disorder (HKD), is greater in males than females[3]. ADHD is more commonly diagnosed in adult males compared with adult females at a ratio of 1.6:1 [4].

In this study, we identified important of predictors of ADHD among children, for example children age, sex, mental health of adults.

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Section 7. Philosophy

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THEATER ART AND MODERN AUDIENCE: PECULIARITIES OF CREATIVE COOPERATION

Abstract. The importance of art, its philosophical and aesthetic value is assessed or rejected depending on the social environment in which the artist lives, the artistic and aesthetic taste of the public, their worldview. Consequently, with this influence, the writer contributes to the development of artistic culture, the socio-spiritual development of society. In support of what has been said, the article analyzes the work done in Uzbekistan over the years of independence in the field of theatrical art, and lists the tasks that need to be completed in the future. The study used methods such as theoretical and methodological analysis and generalization of fundamental scientific works on the problem of the role of performing arts in society. The study examines the needs and desires of today's public based on the experience gained over the years of development of foreign and domestic theaters, and analyzes the participation of national theaters in global processes.

Keywords: theatre, art, society, ideology, crisis, role, performance, socio-spiritual problems.

Art is an artistic reflection of the social relations of its time. Because a work of art is an artistic world that reflects the feelings, thoughts and ideas that the artist dreams about, his mind and heart. Creating the world of art, representatives of theatrical art take into account the impact of creative products – performances on the socio-spiritual formation of the individual, their compliance with the strategic goals of society. They choose the subject and object of performances from the point of view of the problems of social life, the interests of society, philosophical and aesthetic values, covering the thoughts and language of members of society. As the Spanish poet and director Lorca notes, “the theater is a school of laughter and weeping, a free pulpit. From here, people can expose outdated false ideologies and spiri-

tuality, ridicule them, and express the human heart and emotions through vivid examples. If the theater does not feel the pulse of society through laughter or tears, does not reflect the breath of history, does not understand the suffering of its people, the beautiful landscapes of its native land, the national spirit, it should not be called «theater». Such a place is nothing but a place where you can have fun” [1, 39].

The synthetic essence of the theater is manifested not only in the collectivity of its creative process and the integration of all other types of art, but also in the diversity of the goals of its existence. In particular, the social significance of performing arts as a powerful communication channel was recognized at different periods of its history. Broadcasting public values was such an urgent need in Ancient Greece

that the authorities of the policies paid the visitors of the amphitheaters for their time spent. In Spain in the mid-seventeenth century, when “not individuals, but the nation as a whole, devotes the lion’s share of its daytime to art”, leaving “service, workshops and fields” to the great horror of the Jesuits, the best playwrights received the status of courtiers and enjoyed the special favor of Philip IV. The monopoly of the Imperial Theaters, introduced in the 19th century in two Russian capitals, gave the Ministry of the Court the opportunity to tightly control the impact of the stage on the audience and stop attempts to form undesirable public opinion. The same principle was successfully practiced by the Soviet government, which transferred all the theaters of the country to state support, to a stationary state and under ideological tutelage.

A detailed analysis of the role of performing arts in society is a topic for a separate study, but it is important to emphasize that the degree to which the theater fulfills its social goals and objectives is directly related to its economic situation. The theater needs money to exist, and, as already noted, it can receive it from various sources: from the public, from the state, from public organizations, from various kinds of sponsors, donors and patrons. The more channels – the more confident the theater can enjoy freedom, and vice versa – the monopolization of funding increases the risk of falling under control and dictate. Thus, one of the tasks of marketing is to ensure the economic stability of the theater by interacting with several sources of funding at the same time.

If we consider the relationship between the theater and the audience as a partnership, it turns out that the theater today is in a disadvantageous position. The viewer has the right to choose where to spend the evening, the theater has the rigid framework of the rental poster; the viewer has the opportunity to publicly express his opinion about the performance, and the theater does not even allow itself to insist on festive clothes and well-behaved behavior of its audience; the viewer has access to historical, factual and empirical information about the theater –

the theater, very often, has only an approximate idea of its own audience, and so on.

The problem of the relationship between the theater and the audience arose simultaneously with the transformation of performance into a professional activity, that is, income-generating. It is not for nothing that those two who, according to the well-known aphorism of Vladimir Nemirovich-Danchenko something tinkles in his pockets [2, 64] (thus, the concept of “money” immediately inevitably appears next to the word “theater”).

According to the logic of free, not coerced art, the task of the artist is to offer a work, and the viewer’s task is to want or not want to get acquainted and, then, accept or not accept it (after all, art should be free on both sides).

In the artistic process of the Uzbek theatrical art, it is observed that our contemporaries are in the lead, reflecting on themes, ideas that reflect different aspects of life, expressing the social and moral ideals of our people.

Studies show that domestic and foreign representatives of science and culture agree on the recognition and recognition of the priority of the educational function of theatrical art in the socio-spiritual development of the individual. In particular, according to Kh. Abdusamatov, “it is necessary to be able to show the human soul in all its complexity, to be able to delve into the “dialectics of the heart” [3, 27]. The main task of the theater is to educate the audience ideologically and aesthetically. In this regard, its task is to serve to improve the moral and psychological state. First of all, the performances must be in harmony with the great cause of our people, because art must remain impartial, fair and honest under any circumstances” [4, 66] V. Alimasov and Yu. Manzarov reflect on the tasks of art in general and try to illuminate and reveal its essence as a product of social and spiritual events in society: that is, if it contributes to the development of technogenic artificial resources, it will fulfill its social and educational function. Since the influence of art on spiritual life passes through the human heart

and soul, each work of art, in the end, is a reflection of spiritual wealth, creative heart, soul. But this perception is not a product of one-sided influence, changes in society, interpersonal relationships, religious, moral and economic factors affect the ideological basis of the work, the combination of colors and tones through the creative spirit, heart. Indeed, the influence of the educational function of art is manifested in the motivation of the recipient to create, create, create. At the same time, art primarily affects a person's emotions and, consequently, his consciousness, worldview and future actions and deeds. As the Spanish director and poet Federico García Lorca said, "The theater is a social movement... The theater is the most powerful and useful weapon in the reconstruction of a country. A theater that knows how to listen to the needs of people, with its tragedies and musical works, is able to change the worldview of people in a few years. It is a barometer that reflects the high growth or decline of a nation. A nation that does not help create its own theater is either dead or on the verge of death" [1, 42].

It should be noted that recently in our society, as a result of the principles of communicating with people, listening to people's discontent, helping the needy, supporting the needy, freedom of speech has become a habit. Being with people on all fronts, carrying out reforms based on the intellect and thinking of our citizens is a factor that unites people to achieve the common goal of building a new Uzbekistan. As I. Ergashev noted, "the humane and democratic principles of the national idea serve as a base and a unifying factor that determines the harmony of human and public interests" [5, 18]. Theaters are also among the subjective factors that encourage artists to turn the national idea into people's beliefs and convictions. People believe in the images of various heroes performed by theater artists, in the images of spiritual and moral ideals embodied by them, the younger generation imitates and follows them, striving to be brave, courageous, honest and just like them. To do this, the creators themselves must be perfect in every respect, progressive thinkers, keep

up with the times and strive for constant innovation. Unfortunately, in modern artistic processes, innovative research, cardinal artistic and aesthetic innovations are rare. If we look at the current creative environment in our country, it seems to be in a state of stagnation and many of our artists are surrounded by their own worries and problems. However, shouldn't cultural and art figures always be at the forefront of society, inspire people with their works, active citizenship and lead them to noble goals and achievements?

The global coronavirus pandemic in 2020 has significantly affected the weight of performances in theaters and the number of spectators visiting these venues. The pandemic has also forced theaters in developed countries to operate in a new style and new form. The lack of performances for several months resulted in theaters losing billions and facing a creative economic crisis. While most theaters have been completely closed due to the pandemic lockdown, some have been showing their performances live on television for some time. The coronavirus pandemic has led to a significant reduction in live communication and creative relations between theatrical art and the recipient (audience), as well as to the impoverishment of the theatrical repertoire. For example, only 7 performances were staged from the repertoire of the Uzbek National Academic Drama Theater for December 2020, and 13 performances for January 2021. The situation is even worse with the theaters of the capital and regions with limited material and technical capabilities. As G. Tovstonogov noted, "the nature of the theater is as follows: if yesterday's problems become obsolete today, then today's problems will lose their significance tomorrow" [6, 287]. Each performance can be performed ten, a hundred, a thousand times, but it is impossible to create theatrical art with repetitive performances. Of course, it should be noted that even during the quarantine period, new performances were rehearsed in our theaters online, and even the Republican Festival of Young Artists "Debut – 2020" was held according to medical rules. This is a modern

artistic process and an attempt to communicate with the recipient, indicating that the obsolescence of the repertoire is palliative.

In fact, today, with the accumulation of conflicts and disagreements, it is necessary to think about the pace of development and adaptation of theaters to the requirements of the times. Once upon a time, cinema and television were considered the main competitors of theaters. As Peter Brook writes, “It is because of the existence of film and television that theater is in constant motion to maintain its place and position in the modern world” [7, 239] was ambitious.

As you know, drama is the most modern and complex type of artistic word, the basis of theatrical art. Poets and writers, in poetry and prose, directors or actors, after many years of testing themselves on the stage and improving their creative abilities, turn to dramaturgy. Shakespeare, for example, played many roles in the theater for a long time before he began his career as a playwright, and it is interesting to note that his fortune in this area was not so great. M. Kholbekov writes that “at that time, it was customary for authors to dedicate their works to Queen Elizabeth and the nobles of her palace, for which these famous dignitaries gave awards, pensions, and even took them under their protection” [8, 167]. Shakespeare, under the protection of his friend the Earl of Southampton, was free to create, and his life and literary activity flourished and flourished. In other words, the word did not interfere with the freedom of creativity.

Now – in the XXI century, the critical thinking of people is gaining growth, drawing the attention of society to many social and spiritual problems. A democratic society makes a worthy contribution to the formation of public opinion about a just state, to ensuring the work of officials with the people. While this may not affect the entire existence of the recipient in the art forms, the art of cinema in particular is dominated by the creators of the series. Unfortunately, the ineffectiveness of dramatic material in them, amateur performances leads to a decrease in

the aesthetic tastes of the audience, a decline in the moral and aesthetic values of true beauty, splendor, love, kindness, distortion and change in society – the spiritual ideals of our people. Frankly, today the tradition of mentoring in all areas of creativity is in crisis. There are no older playwrights, directors, actors, stage performers who enthusiastically approach the work of young artists, express their ideas and embark on the right artistic and aesthetic path.

It should be noted that certain work is being done in our country to educate artists who can be “exemplary in their work, passed down from generation to generation” [9, 53]. For example, the Young Artists Debut Festival, which was first held in 2005 and then became a tradition, is an important factor in the selection of talents and their emergence on the big stage. The works of young artists in different genres and trends at these festivals are recognized by the public. However, the question of the further creative fate of this young playwright, young director, young actors, whether their artistic and aesthetic activities are monitored remains relevant. Frankly, we did not find any information about this in the course of our research. In fact, as Lorca notes, “in our conflict, the artist must be with his people, crying and laughing together” [1, 61]. Only then will growth and development begin to manifest itself in the philosophical and aesthetic thinking of all members of society.

One of the processes taking place in theaters is the change of generations. The fact that in most performances of the theater repertoire today the main performers are young, confirms our point of view. Most of them continue their creative activity in theaters. It is natural that young people bring the breath of time to the theaters, new interpretations of directing, acting skills. It is necessary to accelerate this process, that is, to attract more young directors, actors, artists, choreographers to theaters, to increase the efficiency of using their talents. Indeed, the strengthening of creative potential is formed not only through the effective use of existing forces, but also through the involvement of new, young professionals in the troupe. But the theater

is such an office where you can always find roles for actors of any age. In an objective and normal situation, theater artists work in a stable office for the rest of their lives. Within the limits of available economic opportunities, the theater will have a limited number of places in the state table. This creates certain difficulties for young artists who graduated from higher educational institutions to enter the world of art in order to find their place.

Theatrical activity has a great cultural potential. This is a special social institution, acting as a means of satisfying a wide variety of human needs and needs. It is important for directors, stage designers and actors creating a performance to remember the

system of factors determining the nature of the audience's assessments of their work. The main factors include: the personal and artistic experience of each viewer, the moderate novelty of the expressive means of theatrical art and the originality of the scenario and director's move, maintaining a balance between traditional and avant-garde artistic and expressive means, the impact of the performance on the psycho-emotional and cognitive sphere of the viewer, emotional discharge as a result of catharsis. The complex of these factors explains the heterogeneous nature of the audience's assessments of the same performance. However, it is precisely this contradiction that stimulates the further development of theatrical art.

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Section 8. Economics and management

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THE WHO AND INTERNATIONAL HEALTH REGULATIONS: LESSONS FROM THE EBOLA VIRUS DISEASE OUTBREAK IN WEST AFRICA

Abstract. The revised International Health Regulations – IHR (2005), a framework that provides public health response during disease outbreaks – is certainly not far from ensuring that WHO remains the coordinator and strategic planner in global public health emergencies. However, it needs to incorporate enforcement mechanisms to avert state parties non-compliance during public health emergencies. This paper critically assesses the extent to which the Ebola outbreak has challenged WHO authority as a key global health actor. While IHR (2005) vagueness and State Parties' misunderstanding may have contributed to non-compliance, the Ebola outbreak revealed that lack of enforcement mechanism underpinned the non-adherence to these regulations. Subsequently, State Parties' failure to comply with regulations challenged the WHO's authority and exposed it to criticism.

Keywords: International Health Regulations, Ebola Virus Disease, World Health Organization, Global Health, Infectious Disease, Public Health.

Introduction

The increasing emergence of disease outbreaks and globalization of public health birthed the International Health Regulations (IHR) (Piot et al. [19]). The IHR which was revised in 2005 to IHR (2005), is a framework that provides guidelines to avert, control, and provide public health response during disease outbreaks while avoiding unwarranted travel and trade restrictions (WHO, 2008). This global health security framework was expected to birth an era of global cooperation. However, to date, it has faced criticism and recommendations for urgent reforms from the various entities including the WHO following the EVD outbreak (Gostin & Katz [9]). It is important to acknowledge WHO at this point as the governing authority aimed at preventing and

responding to public health emergencies instituted by the IHR (2005) (Gostin & Friedman [8]).

This paper critically assesses the extent to which the EVD outbreak has challenged WHO' authority as a key global health actor in the field of international health work concerning IHR (2005). The paper gives an overview of the Ebola epidemic. It shows the extent to which IHR (2005) non-compliance by some State Parties questioned the WHO's authority during the Ebola outbreak. It argues that the IHR (2005)'s lack of enforcement mechanism dissuaded countries from meeting the minimum core capacities (surveillance and reporting capacities) resulting in WHO's late response during the epidemic. Subsequently, it discloses how the IHR (2005)'s lack of enforcement mechanism led to State Parties' failure to comply with

IHR (2005) travel and trade recommendations. This paper also highlights how the confrontation of WHO's authority as a key global health actor spurred criticism and led to the re-emergence of a new global health actor which leaves the WHO with some valuable lessons.

Ebola in West Africa

The EVD outbreak in West Africa was one of the numerous outbreaks that threatened global health security (Kalra et al. [11]). This outbreak which began in 2013 greatly highlighted the inadequacies of international and national institutions responsible for shielding the public from political, social, economic, and most importantly human consequences of infectious diseases outbreaks (Moon et al. [16]). In December 2013, the outbreak began spreading silently in southeast Guinea with a case fatality rate (CFR) of 30–60%, rapidly spreading to neighboring countries like Liberia and Sierra Leone due to the high mobility of people (Baize et al. [2]). By August 8, 2014, the WHO declared the outbreak a Public Health Emergency of International Concern (PHEIC) in accordance to the IHR (2005) and three days later, Guinea, Liberia, Sierra Leone and Nigeria recorded a total of 1.843 EVD cases and 1.013 deaths from EVD (The Lancet Infectious Diseases [25]).

In 2015, a Lancet correspondence revealed that the EVD became by far the largest disease outbreak with over 20,000 cases recorded (Helleringer & Noymer [10]). The correspondence presumed that these statistics were likely to be 2.5 times higher due to under-reporting with an estimated CFR of 60–80%. Unarguably this hypothesis is valid, given that Liberia, Guinea and Sierra Leone previously ravaged by civil war were among the world's poorest countries with weak health systems (WHO, 2015). With the weak health system and huge potential for mortality, it is shocking that the WHO declared a Public Health Emergency of International Concern (PHEIC) four months after *Medecins Sans Frontieres* (MSF) disclosed the unprecedented outbreak (CNN [5]).

In a fair attempt by the WHO to critically evaluate the outbreak, Dr Margaret Chan, WHO's Director-

General (DG) at the time addressed the Ebola Response Review committee of the International Health Regulations. She highlighted State Parties' poor surveillance and reporting, sole reliance on health ministries for IHR (2005) implementation, some State Parties trade and travel restrictions, and lack of formal alert as contributing factors to EVD widespread while excluding the late PHEIC declaration (WHO, 2015). The IHR (2005) addresses all the DG's concerns, although, without clearly stating its enforcement mechanism (WHO, 2005). Remarkably, this was acknowledged by the WHO DG as a necessary reform to fulfill its mandate as a key global health actor (WHO, 2015). Thus, reiterating that IHR (2005)'s lack of enforcement mechanism averted the WHO from fulfilling its mandate in international health work during the EVD outbreak, hence, it challenged WHO authority in global health governance.

IHR (2005)'s lack of enforcement mechanism challenged the authority of the WHO

Globalization of public health associated with opportunity and threat refers to the approach of increasing political, social, and economic integration and interdependence (Brown et al. [4]). As persons and goods move from place to place, this globalization poses a threat through the spread of infectious diseases (Brown et al. [4]). For instance, the EVD which started in Guinea was recorded in Nigeria, Mali, and Senegal and beyond West Africa to countries like Spain, the United States of America, and the United Kingdom (WHO, 2015). Therefore, the WHO transitioning from international health to global public health makes it pertinent that State Parties comply with the IHR (2005) – a laudable initiative aimed at protecting nations in the event of public health emergencies by the WHO.

Minimum Core Capacities – Surveillance and Reporting

The IHR (2005) was meant to minimize the threat of globalization of public health given its sole function to avert, control and provide public health response during disease outbreaks. According to the IHR

(2005), States Parties are expected to communicate all events that represent a PHEIC to the WHO and, develop and maintain core public health capacities for surveillance and response using their national resources (WHO, 2005). However, most countries do not meet the IHR (2005)'s minimum core capacities for surveillance and reporting. For instance, despite WHO's second extended deadline for setting up these capacities, only 64 out of 81 countries that requested extension met these minimum core capacities (WHO, 2015).

During the EVD outbreak, the Guinean health officials misdiagnosed its first Ebola case while Sierra Leone's first suspected case failed to reach the surveillance team on time (Gostin & Friedman [8]). This disclosed that both countries lacked the IHR (2005)'s minimum capacity. Poor surveillance and reporting capacities by these countries particularly Guinea where the outbreak began undoubtedly spurred the slow response by the WHO during the EVD outbreak. Thus, accelerating the widespread of EVD.

The WHO's Interim Assessment Panel at some point diplomatically claimed that it is either their senior colleagues who failed to identify the magnitude of EVD, or the urgent warnings did not reach the senior leaders (WHO, 2015). However, the late declaration is unlikely due to the former given technical expertise and quality research output by the WHO (Luca & Claude-Henri [15]). This late declaration is closely linked to the poor surveillance and reporting capacities by the affected countries. The late response by the WHO would have been averted if the IHR (2005) incorporated an enforcement mechanism for State Parties to ensure that all countries meet the minimum core capacities. As a result of the late response by the WHO, the Harvard-LSHTM Independent Panel on the Global Response to Ebola lost confidence in the leadership ability of the WHO (Moon et al. [16]). An action that challenged the WHO's authority. To the extent that it led to the re-emergence of MSF, an international health organization that pioneered international health work during the outbreak, by deploying health workers to the af-

ected countries, issuing EVD preventive and control measures and even contacting the WHO (Williams [36]). Hence, the WHO's authority in international health work was greatly challenged.

A critical assessment of the Integrated Disease Surveillance Response (IDSR) recommendations in the WHO African region revealed that only 43 out of 46 countries implement them because it resonates with their priorities (Kasolo et al. [12]). The IDSR was formulated to boost African countries capacities to meet the IHR (2005), yet not all African countries comply. All African countries would have complied if IDSR had an enforcement mechanism, thus spurring IHR (2005)'s compliance which would have strengthened WHO's authority during the EVD outbreak. Ultimately, this shows that the lack of enforcement mechanism on health regulations underpinned the confrontation of WHO authority during the EVD outbreak which disrupted global health security. Nonetheless, the tendency of the IDSR resulting in duplication and fragmentation of the IHR (2005)'s effort needs further investigation given its protection of Africa countries' priorities.

Given the impact of the IHR (2005), its lack of implementation by some State Parties become worrisome. Surprisingly, at the time of the IHR (2005)'s second Review Committee meeting, 48 countries were yet to communicate their intentions regarding its adoption (WHO, 2015). Certainly, this would not have been the case if the IHR (2005) incorporated an enforcement mechanism. Although, one may argue that this is due to conflicting global interests and desire for national autonomy. However, these excuses would be invalid if the IHR (2005) had an enforcement mechanism.

Travel and Trade Restrictions

Globalization transcends the health sector thereby serving as a driver of trade, economic growth, and human rights – all of which the IHR promised to protect (Ruger & Yach [21]). By acknowledging the importance of trade and travel, the IHR (2005) upholds three vital ethos namely, public health, commerce and

human rights (Gostin & Katz [9]). Hence, an important objective of the IHR (2005) is to minimize unnecessary travel and trade restrictions by clearly identifying appropriate public health measures (WHO, 2005). However, due to IHR (2005) lack of enforcement mechanism, some countries did not adhere to these regulations during the EVD outbreak.

Research conducted by Wendy Rhymer and Rick Speare, both academicians in Australia and England respectively disclosed State Parties non-compliance to the travel and trade recommendations of the IHR (2005) during the EVD outbreak thus challenging WHO's authority as a key global health actor (Rhymer & Speare [20]). The research revealed that 58 State Parties either disregarded or exceeded these international health regulations, 43 countries prohibited the entry of foreigners from the EVD affected countries and 15 of them applied substantial restrictions from travellers from affected countries. According to Rhymer and Speare, six State Parties enforced quarantine against the health regulation while eight State Parties requested a medical certificate proofing that travellers were EVD free. The research shockingly revealed that a country allowed entry of foreigners working in the EVD affected region but not citizens of EVD affected countries. This expression of stigma questions the essence of a global corporation and WHO authority in global health governance.

Despite the IHR (2005)'s mechanism to harmonize global procedures during public health emergencies, Australia and Canada were among the 30 State Parties that enforced substantial travel restrictions on travellers from most EVD affected regions (Pattani [18]). In addition to these countries' refrainment to justify their actions, Pattani [18] posits that their decision as high-income countries potentially reduced global cooperation degraded the IHR (2005) and ultimately challenged the authority of the WHO as a key global actor. These countries actions were not justifiable given the travel and trade recommendations of the IHR (2005) during pandemics. Particularly for Canada, whose researchers deduced

that only two or three EVD-affected persons had the likelihood to depart the affected countries monthly (Bogoch et al. [3]). Yet, it still restricted travel thus challenging the authority of the WHO.

Canada's action which unarguably was underpinned by the IHR (2005) lack of enforcement mechanism questions the need for low-income countries and lower-middle-income countries to associate with the global community. It also impedes one of the IHR (2005) vital ethos which is human rights while increasing other countries refrainment from reporting to the WHO during public health emergencies (Pattani [18]). Perhaps, Canada intended to choose safety over global cooperation given the widespread of the EVD and its experience with the WHO-imposed travel ban during the severe acute respiratory syndrome outbreak in which it lost about \$2 billion (National Advisory Committee on SARS and Public Health [17]). However, this does not allude to the fact that its action contradicted the IHR (2005) thus weakening the WHO's power to coordinate at the time.

As countries continued to refrain from their obligations to the IHR (2005), the WHO's power in global health governance and coordination becomes challenged. Even Afghanistan, one of the world's poorest countries (Afghanistan Times [1]), requested that travellers presented a medical certificate to prove that they were EVD-free (Rhymer & Speare [20]). This unnecessary travel restriction did not even consider EVD's incubation period which is 2–21 days with symptoms manifesting only after 3 days (WHO, 2020). More so, does a country with such a weak economy have the capacity to verify the authenticity of international travellers' medical certificates? – is a salient question suggesting that if Afghanistan risked being sanctioned by the WHO, such actions void of medical evidence and critical appraisal would have been avoided. Iraq also followed suit, requesting a medical certificate from travellers from EVD-affected countries while exempting diplomats (Rhymer & Speare [20]). Thus, instigating stigma among nations. This highlights the extent to which the

IHR (2005) was disregarded ultimately challenging the power of the WHO in global health governance.

Remarkably, the United States was one of the few countries that showed compliance despite recording a few EVD cases acknowledging that travel bans put Americans at substantial risk (The Guardian [23]). An action that must have relieved the WHO. Unlike the US, most State Parties downplayed the implications of disregarding the IHR (2005). This threatened global health security, governance and corporation emphasizing the IHR (2005)'s weakness – lack of enforcement mechanism. Consequently, this weakness presumably spurred by the lack of understanding of the IHR (2005) may be attributable to the IHR (2005)'s vague language directing State Parties to collaborate *to the extent possible* (WHO, 2005).

Before the revision of the IHR, it has always sought to achieve global health security while minimizing trade restrictions (Giesecke [6]). With the cholera outbreak associated with frozen fish, Giesecke posits that most countries often choose national sovereignty over infectious disease importation (Giesecke [6]) due to the movement of goods and people. The EVD outbreak was no exception as trade and aid were also hindered due to travel restrictions (Gostin & Friedman [8]). Perhaps due to EVD transmission from human-to-human and wild animals-human (WHO, 2020). A comprehensive report by the World Bank Group revealed the economic impact of the EVD outbreak on the affected countries and neighbouring economies (The World Bank [26]). The report showed that trade and commerce dwindled during the outbreak and had continued potential in the absence of proactive actions. This inference comes with no surprise given the cancellation of nearly 30% of flights travelling to the most affected regions (Lamprey & Awojobi [13]). Hence, commerce, a vital ethos of the IHR (2005) was threatened at the time. Yet again, revealing the extent to which the WHO's power as a key global health actor was challenged.

Constructive Criticism of the WHO: Re-Emergence Of a Global Actor And Lessons

Before the EVD outbreak, the Director-General of the WHO expressed the organization's inability to promptly respond to the rapid global health challenges and sought ways to reclaim its relevance (Sridhar et al. [22]). The EVD outbreak presented the WHO with this opportunity. However, the IHR (2005) non-compliance by state parties weakened its effort at the time. As a result, experts criticized the WHO for the late declaration of the EVD outbreak as a PHEIC (The Guardian [24]). Furthermore, the WHO use of both the IHR (2005) and the Emergency Response Framework in its declaration spurred confusion and criticism (Gostin et al. [8]).

Beyond these criticisms, the WHO's authority was extremely challenged as it saw the re-emergence of a new global health actor- MSF. MSF, established to provide humanitarian service was the first to disclose the unprecedented outbreak (Gostin & Friedman [8]). The organization created awareness and eventually took proactive steps to secure global health security by mobilizing the Guinean authorities, notifying WHO, giving guidelines and containing infected patients even before the arrival of medical experts from the WHO thus receiving the 2015 Lasker-Bloomberg Public Service Award (Williams, [36]). The MSF's actions during the EVD outbreak questions the alertness and responsiveness of the WHO in no small measure.

Given the extent to which the authority of the WHO was challenged which saw the re-emergence of MSF, WHO should enforce routine health reports by State Parties, publicly acknowledge reports from non-governmental organizations, ensure State Parties justify any action of IHR (2005) non-compliance as well as to conduct its analysis to verify State Parties and other actors information (Gostin et al. [8]). Although, this proposal does not completely address all the critiques faced by WHO, however, it will contribute to ensuring its authority is strengthened.

Conclusion

Beyond the implications of IHR (2005)'s criticism of WHO, its infringements on human rights, public health and trade due to State Parties non-compliance are huge concerns. Therefore, the urgent reform of the IHR (2005) becomes paramount in ensuring global

health security and global corporation given the globalization of public health. These reforms must incorporate compliance mechanisms otherwise key global health actors risk confrontation and exertion of national autonomy in the event of public health emergencies, which remains unpredictable.

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