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## ***Generativity is a Core Value of the ESJ: A Decade of Growth***

Erik Erikson (1902-1994) was one of the great psychologists of the 20th century<sup>1</sup>. He explored the nature of personal human identity. Originally named Erik Homberger after his adoptive father, Dr. Theodore Homberger, he re-imagined his identity and re-named himself Erik Erikson (literally Erik son of Erik). Ironically, he rejected his adoptive father's wish to become a physician, never obtained a college degree, pursued independent studies under Anna Freud, and then taught at Harvard Medical School after emigrating from Germany to the United States. Erickson visualized human psychosocial development as eight successive life-cycle challenges. Each challenge was framed as a struggle between two outcomes, one desirable and one undesirable. The first two early development challenges were 'trust' versus 'mistrust' followed by 'autonomy' versus 'shame.' Importantly, he held that we face the challenge of **generativity** versus **stagnation in middle life**. This challenge concerns the desire to give back to society and leave a mark on the world. It is about the transition from acquiring and accumulating to providing and mentoring.

Founded in 2010, the European Scientific Journal is just reaching young adulthood. Nonetheless, **generativity** is one of our core values. As a Journal, we reject stagnation and continue to evolve to meet the needs of our contributors, our reviewers, and the academic community. We seek to innovate to meet the challenges of open-access academic publishing. For us,

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<sup>1</sup> Hopkins, J. R. (1995). Erik Homburger Erikson (1902–1994). *American Psychologist*, 50(9), 796-797. doi:<http://dx.doi.org/10.1037/0003-066X.50.9.796>

generativity has a special meaning. We acknowledge an obligation to give back to the academic community, which has supported us over the past decade and made our initial growth possible. As part of our commitment to generativity, we are re-doubling our efforts in several key areas. First, we are committed to keeping our article processing fees as low as possible to make the ESJ affordable to scholars from all countries. Second, we remain committed to fair and agile peer review and are making further changes to shorten the time between submission and publication of worthy contributions. Third, we are looking actively at ways to eliminate the article processing charges for scholars coming from low GDP countries through a system of subsidies. Fourth, we are examining ways to create and strengthen partnerships with various academic institutions that will mutually benefit those institutions and the ESJ. Finally, through our commitment to publishing excellence, we reaffirm our membership in an open-access academic publishing community that actively contributes to the vitality of scholarship worldwide.

*Sincerely,*

***Daniel B. Hier, MD***

*European Scientific Journal (ESJ) Natural/Life/Medical Sciences*

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# Working Poverty in the Framework of the Work Anthropology: A Literature Review and Considerations on Care-related Labour

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## Abstract

The phenomenon of working poverty is significant and involves an important percentage of population in many countries. This paper focuses on sketching, without being exhaustive, the state-of-the-art on working poverty in terms of definition and size. It also considers possible recent correlations of working poverty with the COVID-19 pandemic and with the rise of the digital labour platforms. This paper also shows the difference between labour, work, and action according to Hannah Arendt, together with the concept of anthropology of work of Maria Pia Chirinos. Finally, highlighting the pioneering works of Chirinos, the study suggests a picture in which human being, or a rational animal (Lat.: *animal rationale*; Gr.: *zoon logon echon*, ζῷον λόγος ἔχων), essentially acts in endeavours, such as labour which is devoted to self-preservation and care. Under such picture, society should take into account the richness of the traditions and skills of different types of jobs and also in terms of minimal wage.

**Keywords:** Working Poverty, Hannah Arendt, Anthropology of Work, Labour, Work, Action

## Introduction

The phenomenon of working poverty is widely studied in literature with noteworthy works that discuss the shades of the meaning of working poor

by taking into account the labour market and local living costs in a certain country or in regions of a certain country (Peña-Casas & Latta, 2004; Van Winkle & Struffolino, 2018; Wuyts, 2011). Without being exhaustive, the paper gave some examples of literature studies on working poor. Although the definition of working poor is not an easy task and the official measurements are controversial for different countries, these examples were given to highlight the importance of the phenomenon.

### **Empirical Studies on the Working Poor**

In 2004, Ramòn Peña-Casas and Mia Latta wrote the superb publication *Working Poor in the European Union* (Peña-Casas & Latta, 2004). Based on their extensive report, the first chapter focuses on the definition of working poor. After a literature research on the topic, Peña-Casas and Latta wrote the minimal conditions that the individual must fulfil to be categorized as working poor:

- “be living in a household considered as poor;
- be working or searching for a job;
- have worked or searched for a job during a period (one month to six months) of the previous year, or have accumulated a corresponding number of working hours.” (Peña-Casas & Latta, 2004)

Consequently, there are several approaches to define the working poor in different countries and in the whole world. Peña-Casas and Latta in Chapter 2 discuss the incidence of working poor in the European Union in 1999, and they report a number of working poor that is around 11 million, corresponding to 7% of the EU population (Peña-Casas & Latta, 2004). Gundogan, Bicerli, and Aydin, at Anadolu University, report that 550 million people in the world are working poor (Gundogan et al., 2005). Thus, this was done using the working paper written by Steven Kapsos in 2004 (Kapsos, 2004). In 2018, Lohmann and Marx (Lohmann & Marx, 2018), mentioning the International Labour Organization (ILO) report of 2014 (*Global Employment Trends 2014*, 2014), stated that 839 million people lived on 2 US dollars or less a day in 2013. In 2020, Estelle Sommeiller reported her own calculations of working poverty based on the employment of EU-SILC Microdata, which shows percentages for Spain, Italy, and Portugal to be around 15% and that of Greece to be around 30% (Sommeiller, 2020).

Jeannette Wicks-Lim (Professor at University of Massachusetts Amherst) has written in 2012 the article *The Working Poor: A Booming Demographic* (Wicks-Lim, 2012). Being an expert of minimum wage, Wicks-Lim focuses on a discussion concerning salary. Thus, employers should align the payment of workers to their increasing production of goods and services. Wicks-Lim gave a reminder on the importance of a powerful union movement

that should fight against poverty wages, and denounces the absence of such powerful union movement (Wicks-Lim, 2012).

In 2020, Marianna Filandri and Silvia Pasqua (Professors at Università di Torino), together with Emanuela Struffolino (Researcher at the Berlin Social Science Center, now Professor at Università di Milano), wrote the article *Being Working Poor or Feeling Working Poor? The Role of Work Intensity and Job Stability for Subjective Poverty*. In this article, they stated that “having a job is not a sufficient condition to avoid poverty, either in terms of (monetary) objective or subjective poverty” (Filandri et al., 2020). Indeed, this aspect leads to an additional degree of freedom in a discussion on working poverty.

### **Recent Studies in the Working Poor**

The appearance of SARS-CoV-2, and the subsequent pandemic of COVID-19 as of 2020, has strengthened problems already existing (Patel et al., 2020). In 2020, Andrea Neri and Francesca Zanichelli, at Banca d'Italia, have written a report of the wealth of Italian families (Neri & Zanichelli, n.d.). According to Neri and Zanichelli, more than half of the interviewed people (the studied sample includes more than three thousand people) have stated that due to the pandemic, there has been a contraction of the family income (Neri & Zanichelli, n.d.).

Finally, the occurrence of platform workers is a very recent phenomenon. Many types of works, especially goods delivery, text translation and software programming, are coordinated by platforms and algorithms. In 2018, Pesole et al. have written a first technical report on platform work in Europe (Pesole et al., 2018). In 2020, Urzì Brancati, Pesole, and Fernández-Macías wrote a second extensive report on platform workers (European Commission and Joint Research Centre, 2020). In their executive summary, they wrote:

“Digital labour platforms are a new form of coordinating the provision of labour services enabled by the latest technological revolution. Many authors claim that digital labour platforms have the potential to disrupt the world of work, both positively by boosting participation in the labour market through better matching procedures, and negatively by circumventing regulation and lowering the quality of employment.” (European Commission and Joint Research Centre, 2020)

The fact that digital labour platforms could circumvent regulation and lower the quality of employment could be a new issue in the labour market. In cases like the digital labour platform, one can talk about *technoanomia*, since

the fast technological advancement leads to a breakdown of social norms (in this case it is related to work).

Interestingly, while the phenomenon of working poor has been studied from an economical and sociological point of view, a discussion that highlights the worker dignity, also in terms of reasonable wage tier, supported by philosophical and anthropological pictures of work in the contemporary world is missing. However, such pictures would lay the foundations for a more comprehensive understanding of the contribution and the reward of the workers in the society, together with the realization and the happiness of the workers. The publications of Maria Pia Chirinos (Chirinos, 2005, 2007, 2008, 2009), which re-elaborate and criticize the well-known thoughts of Hannah Arendt in *The Human Condition* (Arendt, 1998), represent pioneering studies in the anthropology of work.

### **Arendt's Influence on Labour, Work, and Action**

This study shows the difference between labour, work, and action according to Hannah Arendt. Arendt, in *The Human Condition*, distinguishes three different types of human activities: labour, work, and action. Labour is the human activity that is focused on biological necessities, self-preservation, and reproduction. Labour can be related to the “social reproduction” mentioned by Nancy Fraser (Fraser, 2016). Furthermore, work is the human activity devoted to the fabrication of durable objects that will become part of the world. The durability “gives the things of the world their relative independence from men who produced and use them” (Arendt, 1998). Action is the human activity by which humans intersubjectively interact with each other.

In this study, two initial assumptions were made: The first assumption is the correlation between working poor and low-skilled workers, since “[w]orkers with low education levels and little or no formal qualifications are more likely to be exposed to flexible employment types and poor income, as well as periodic unemployment spells” (Peña-Casas & Latta, 2004). The second assumption can be considered as a weaker assumption where the study shows a correlation between low-skilled work and Arendt's labour.

### **Chirinos Seminal Contribution**

Maria Pia Chirinos focuses on human activities depicted by Arendt, highlighting the importance of labour and work. Within this framework, Chirinos, in the anthropology of work, has masterfully developed four theses.

In the first thesis, Chirinos states that it is necessary to recover the notion of matter in its two realizations: i) as metaphysical principle of substance and power; ii) as alive matter that, together with the soul, allows one to talk about various functions in the different levels of life.

In the second thesis, Chirinos proposes a model of humanism in which the corporeality, the dependence, and the vulnerability are positive values. Moreover, everyday life has to be a relevant aspect of such model of humanism.

In the third thesis, Chirinos presents the notion of work as an anthropological category, i.e., as a function able to shed light on the specificity of a human being: the rational and practical capacity, the power to transform the reality. Thus, work is an instrument for acquiring virtues and generating culture.

In the fourth thesis, Chirinos verifies that this notion of work is present at any level of the human action, even in the types of works that Hannah Arendt, in *The Human Condition*, considers as less representative of human being. This refers to the manual labours that are useful for corporal and daily necessities (Chirinos, 2007).

Along with the fourth thesis, Chirinos stressed how manual labours have been considered to be less representative of human being not only by Hannah Arendt. Manual labours have been considered less representative of human being by majority of the philosophers. Such picture is highlighted in the historical overviews, of the conceptions of work, sketched by Enzo Rutigliano and Maria Pia Chirinos.

### **The View of Rutigliano and Chirinos**

*Work (and labour) in Western culture according to Rutigliano* (Rutigliano, 2011): Enzo Rutigliano gives an overview of labour and work from the Bible and ancient Greeks up to contemporary philosophy. First, Rutigliano stresses a particular meaning of the episode of the sirens and Ulysses in the *Odyssey*: the sirens are a metaphor of the knowledge, and the rowers have wax in their ears to pass unscathed such knowledge. Thus, labour demeans human being. Also, in the Bible (Genesis), work is considered as a punishment. For Aristotle, the proper endeavour of human being is the activity of the rational soul. In the Middle Age, it is evident that there is a contrast between *vita contemplativa* and *vita activa*, with the exception of the rule of Saint Benedict “*ora et labora*”. For Luther and Calvin, work is a vocation (*Beruf*, which in German means vocation, call, duty). For Locke, work is a foundation and justification for the property, while for Smith work is primarily a human activity. In Marx, and Hegel, work is again primarily human, but it should be relieved from the rough conditions due to capitalism. Furthermore, Nietzsche recalls the ancient Greeks that work demeans human being. Lastly, Rutigliano stresses the bivalent perception of work in the second half of the 20th century that work is not anymore the goal of human being, but it is the material basis for human preservation.

*Work (and labour) in Western culture according to Chirinos* (Chirinos, 2008): Chirinos starts the historical overview from Plato: In the cave people that work are like sleep-walkers, since they do not know the good and the truth. In Aristotle, the human perfection is in the *polis*, as location, and in the *otium* (Gr.: *scholé*, σχολή), as activity. The view of Middle Age by Chirinos is similar to the one by Rutigliano. Interestingly, for Chirinos with Reformation and modern philosophy, especially Descartes, work is considered a proper human activity: a new model of humanism, the *homo faber*, arises (Chirinos, 2009). With the technological advancement, work becomes again a mechanical activity. Both Adam Smith and Karl Marx conceive the work as a mere means of production. In the 20th century also the non-manual labours can be monotonous and demeaning (*low-tech* works).

Chirinos states that, many years after the publication of *The Human Condition* by Hannah Arendt, a criticism of Arendt's position, i.e., the distinction between labour and work, cannot be procrastinated. In fact, Chirinos underlines that activity like nutrition, cooking, care of fragile and vulnerable living being unravel a plethora of cultural and historical manifestations, which allow to talk about arts and traditions in which reason and freedom play a major role. Chirinos states that the fact that labour does not lead to durable products does not diminish the richness of such labour (Chirinos, 2008). It is remarkable that Chirinos evens out the *zôon logikon* to the *animal laborans*: labour and work are both human activities. Such activities require practical intelligence, willingness, imagination, sensitivity (Chirinos, 2008).

### **Animal Rationale in Labour Context**

In this work, recalling the aforementioned works of Chirinos, the study shows that the rational animal (Lat.: animal rationale; Gr.: *zoon logon echon*, ζῷον λόγος ἔχων) is essentially active in terms of labour, work, and action. There are many straightforward examples. An example that is also mentioned by Chirinos is the endeavour of a cook in preparing dishes. Such activity can be considered as a labour for nutrition and, thus, self-preservation. Through this way, we would neglect the ensemble of skills of the cook to make palatable dishes, the cooking traditions, and the research and development in gastronomic science (Aguilera, 2017; Cassi, 2011). Another example is the ability of construction workers to make temporary structures for festival and events, in which activities like the Arendt's action can find a suitable environment. Also, the skills in organizing an event in terms of decoration and arrangements of proper items (e.g., stage, seats for the audience, audio system) are remarkable.

Another important aspect is care. The words of Nancy Fraser in *Contradictions of Capital and Care* are absolutely notable. In fact, Fraser states that “social-reproductive contradiction of capitalism lies at the root of the so-called crisis of care” and that without *social reproduction*, “there could be no culture, no economy, no political organization” (Fraser, 2016). By *social reproduction*, Fraser means affective and labour works like birthing and raising children, maintaining households, etc.

Thus, the two assumptions that label working poor’ jobs, that can be in many cases correlated to Arendt’s labour and low-skilled jobs, can be strongly criticized. Society is evidently enriched by the labour related to working poor. This aspect should be recognized and rewarded by the society, and also in terms of wage laws that takes into account the importance of the labour. On the one hand, it is important to clarify the differences between the outputs of labour, work, and action according to the distinction of Hannah Arendt. On the other hand, the interconnection between such outputs, labour, work, and action should take into account, as underlined also by Nancy Fraser, that in many cases the action needs work and labour.

## Conclusion

A debate on working poverty began in the 1970s and 1980s in the United States. Nowadays, the concept of working poor has become increasingly applicable in the labour market of developed and developing countries (Peña-Casas & Latta, 2004). This study uses a different approach in discussing working poverty within the framework of the anthropology of work, which was developed in the pioneering works of Maria Pia Chirinos. Working poor can be related to low-skilled works, and low-skilled work can be related to Arendt’s labour, i.e., the human activity that is focused on biological necessities, on self-preservation, and on reproduction. Such two assumptions can be strongly criticized. In fact, Chirinos sheds light on the importance of labour, which unravels a plethora of human cultures and traditions. The study integrates Chirinos’ appreciation of labour stressing that such manual works and care-related jobs are foundational for human being. The rational animal, *zoon logon echon*, is essentially and entirely active also in the labour. Thus, Arendt’s labour should not be labelled as low-skill work and, at the same time, working poor’ activities should not be labelled as low-skill jobs also In this picture, the appreciation of the different typologies of jobs, in terms of minimal wage laws and welfare strategies, should be pursued.

## Methodology

First, a literature review on the definition and size of working poverty was carried out in this study. Also, working papers (e.g., of the European Commission) and original works of several experts was used. In this study, no

data (primary data) was generated but data published in previous works (secondary data) was mentioned.

Second, the study analyzed the concepts of labour, work, and action in the conception of Hannah Arendt and the concept of work anthropology of Maria Pia Chirinos.

Last, this study provided a speculative rationale that correlates the importance of the jobs performed by working poor, the richness of traditions and cultures of labour, and the importance of Fraser's social reproduction in the society.

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## **Social Media Dependency and Work-Related Attitudes with Religiosity Mediation**

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### **Abstract**

The paper explores the social media dependency and work-related attitudes about religiosity as a mediator among employees in public and private organizations. Not many studies explore the above variables especially in the context of Malaysian employees. Self-administered questionnaires were distributed among employees in the public and private organizations in the selected major cities in the country. Data analyses are conducted using SPSS, namely reliability analysis, correlation analysis, regression analysis, and mediation analysis. Interestingly, the paper only discovers religiosity has a positive impact on work-related attitudes among employees in public and private organizations. Unfortunately, the other hypotheses are not supported and no mediation of religiosity on social media dependency and work-related attitudes was discovered. Further analysis is conducted on religiosity as moderator; the result also shows no moderation of religiosity on social media dependency and work-related attitudes. Discussions on the results are elaborated accordingly.

**Keywords:** Social media dependency, work-related attitudes, religiosity, public-private employees

## **Introduction**

Almost all employees in the public and private organizations are using some form of social media to be connected and in contact with their business clients, superiors and managers, colleagues, and family members. The use of social media platforms could be seen as a positive and encouraging way of communication in this 21 Century. On the other hand, some employees are having a dependency on social media that is negative and unproductive toward their work-life and family-life. Moreover, this dependency could cause the employees are affecting their organizations' productivity and also their well-being.

The well-being of employees had been the prime agenda of the Ministry of Human Resources and the nation. The government wanted to have balanced well-being among its citizens and employees for mobilizing the nation's aspirations to be a developed nation by the year 2020. In this spirit, the nation had launched the "Transformasi Nasional 2050" (also known as TN50). This TN50 has been an initiative by the government to landscape Malaysia's future from 2020 to 2050. The spirit of TN50 is to be amongst the top countries in the world in economic development, citizen well-being, and innovation.

Historically, TN50 had been underpinned by the New Economic Policy (NEP) which was launched from 1971 to 1990. The NEP had a novelty to "eradicate absolute poverty irrespective of race and eliminate the identification of race by economic function". Moreover, from 1991 to 2020, the nation had been guided by its Vision 2020 aspiration that "to become a developed nation, in our own mold" with 9 challenges in 3 phases, namely National Development Policy, National Vision Policy, and New Economic Model. Moreover, the nation needs to mold its citizens to become world-class employees. This cannot be achieved without the various programs and policies being spearheaded by the government through its Ministries and Departments at multiple levels such as national and state levels. Thus, the TN50 had been calling various people from all walks of life to come forward for various meetings and gatherings for them to contribute ideas toward the establishment of TN50. This paper realizes that the well-being of the nation's employees in the public and private sectors would play an important role in the success of TN50. The well-being of employees is not confined to their health issues but also their emotions and feelings. Moreover, employees of today's had been involved in the use of social media at work and home. These employees are extensively devoting their time to be online with their colleagues almost round

the clock every day. In some cases, employees are addicted to the use of social media regardless they are at work or home.

Public and private organizations could not monitor and hinder their employees from using social media during office hours may it be for business or personal. Unfortunately, some employees are abusing the use of social media more in their communication, and in turn, this has an impact on their work performance. Thus, this further in turn translated into the poor performance of the employee, and poor achievement of profits for the organizations. The uncontrolled dependency on social media may affect the employees' work-related attitudes and outputs for the organizations. Moreover, this situation could be linked with their work-related attitudes at work, namely job satisfaction, career satisfaction, and organizational commitment.

In the context of Malaysia, religiosity plays an important influence in employees' daily life. The role of religiosity could be seen as an antidote to allow employees who are dependent on social media to be rationalized their behavior at work. Moreover, in the diverse religious belief in the nation, it is wise to associate religiosity as the mediating factor among employees in the public and private organizations toward their social media dependency and work-related attitudes. Thus, this paper explores the relationship between social media dependency and work-related attitudes with religiosity as a mediator.

The significance of this paper is to eradicate the understanding of employees in the public and private organizations on their dependency on social media. The dependency would lead to addiction to social media among these employees. Thus a paper explores the social media dependency issues among these employees of the nation. Moreover, these employees' work-related attitudes also need to be explored as the outcome of their social media dependency behavior. Individual belief, namely religiosity, would have a significant impact on the employees' behavior at work in public and private organizations. Thus religiosity could be used as a guiding parameter to these employees in curbing their social media dependency. In summary, the social media dependency, work-related attitudes, and religiosity of employees in the public and private organizations would have a major impact on the nation's TN50 aspirations of becoming a developed nation with sound economic development, citizen well-being, and innovation.

This paper intends to unearth the issues on social media dependency, work-related attitudes, and religiosity among employees in public and private organizations. Thus, the objectives of this study are listed below:

1. To explore the relationship between social media dependency and the work-related attitudes of employees in public and private organizations.

2. To explore the mediation of religiosity between social media dependency and the work-related attitudes of employees in public and private organizations.
3. To understand the impact of social media dependency toward work-related attitudes of employees in public and private organizations.
4. To understand the mediation impact of religiosity between social media dependency and work-related attitudes of employees in public and private organizations.

## **Literature Reviews**

### **Social Media Dependency**

Social media dependency has been associated most with employees in public and private organizations. The use of social media has been developed with innovation and technological developments through the internet. Thus the internet has connected employees with their colleagues at work and in social meetings. The connection has no boundaries; may it be at work and home, even they are connected everywhere and all the time. Moreover, social media has been used for personal and business communication in this era. Social media sites empower users to take an active role in their socialization process and in constructing their self-identity (Urista et al., 2009; Sponcil & Gitimu, 2013). Moreover, digital technology allowed users to show considerable information about themselves and their friends. This self-disclosure is a way to open up their own identities of how they want others to perceive them (Pempek, Yermolayeva, & Calvert, 2009; Sponsil & Gitimu, 2013). Many individuals use social networks sited to feel popular, trying to add as many "friends" as possible so they appear to be more admired (Pempek et al., 2009; Sponsil & Gitimu, 2013).

Not much research has been done to understand the Malaysian employees on their use of social media about their work-related attitudes with religiosity as mediation. Thus the noble intention of this research is to contribute to the body of knowledge on the use of social media about employees' work-related attitudes with religiosity as mediation. The use of social media has been associated with users aged 18-29. They have several social media on various websites (Sponcil & Gitimu, 2013; Lenhart, Purcell, Smith, & Zickuhr, 2010). An interesting study discovered that the amount of time spent daily on social networks varied greatly (Sponsil & Gitimu, 2013). They found interesting findings on gender with the use of social media, women are more likely than men to have a personal profile on Facebook, but men are more likely to have a profile on LinkedIn. Females use social media for maintaining relationships with family and friends, passing time, and entertainment, but men were more likely to use social media to meet new

people. Moreover, the educational experience of men and women were seemed to play a factor in social media use (Sponsil & Gitimu, 2013).

Furthermore, various studies on social media dependency had been done in other countries on instruments. Lin, Broström, Nilsen, Griffiths, and Pakpour (2017) had examined their instruments on Iranian adolescents in assessing their addiction to social media. In another context, an Italian psychometric was conducted in assessing social networking addiction (Monacis, Palo, Griffiths, & Sinatra, 2017).

### **Work-Related Attitudes**

Work-related attitudes are based on the total quality management perspective. Alas and Edwards (2006) claim work-related values as the outcome of the intricate interaction of several factors which include the national cultural and institutional context, the specific industry context, the organizational environment, and, finally, the characteristics of individuals themselves. Guimaraes (1996) conceptualizes several indicators for work-related attitudes such as job satisfaction, career satisfaction, and organizational commitment. These indicators will be examined about the use of social media and employees' work-related attitudes.

In other studies, Kim, Egan, and Moon (2014) tested a conceptual model of the relationships between managerial coaching behavior and employee attitudes as well as performance-related outcomes in public organizations in the USA and South Korea. This resulted from the generalizability of managerial coaching efficacy as well as evidence for potential cultural differences in the effect of managerial coaching in the two countries. Walumbwa, Lawler, Avolio, Wang, and Shi (2005) examined how collective self-efficacy moderated the influence of transformational leadership on followers' work-related attitudes among bankers in China, India, and the USA. Their results revealed that transformational leadership and efficacy beliefs were positively related to followers' work-related attitudes.

On the other hand, not many studies are found that directly link how the use of social media relates to employees' broader psychological attachment to the organization and their job as gauged by their job satisfaction, career satisfaction, and organizational commitment. Further, this provides an opportunity for this research to explore the link between the use of social media toward work-related attitudes. Moreover, this research can examine the impact of social media use on job satisfaction, career satisfaction, and organizational commitment.

### **Religiosity**

Reviews indicated that more religious persons more strongly promote some and reject other values than less religious persons (Gungor, Bornstein &

Phalet, 2012). Strong religious persons rank values focused on others' needs and expectations (such as forgiving and obedience) higher, and self-focused values (such as being independent and logical) lower than less religious persons (Rokeah, 1969 in Gungor, Bornstein & Phalet, 2012). Khasif, Zarkada, and Thurasamy (2016) stated that the extended theory of planned behavior (ETPB) into which religiosity was integrated as a moderating variable. This paper demonstrates that the ETPB can explain intentions to behave ethically among Pakistani bankers. Wang, Chi, and Erkilic (2021) examined the effects of employees' intrinsic and extrinsic religiosity on building their mental toughness and mindfulness and the further formation of employees' political skills. They discovered that intrinsic religiosity improves employees' mental toughness, while extrinsic religiosity enhances employee mindfulness among Muslim hotel employees in Turkey. Purnamasari and Amaliah (2015) discovered a positive and significant effect as a variable that strengthens the relationship between religiosity and fraud prevention in the workplace.

Interestingly, Schwartz (1992 in Gungor, Bornstein & Phalet, 2012) identified ten distinct value types across a wide range of cultures, which he organized around general self-focused (Power, Achievement, Hedonism, Stimulation, and Self-Direction) versus other-focused goal orientations (Universalism, Benevolence, Tradition, Conformity, and Security). Across cultures, religiosity was positively associated with other-focused values, particularly tradition and conformity, whereas associations with self-focused values, especially self-direction, stimulation, and hedonism, were negative (Saroglou, Delpierre, & Dernelle, 2004). Therefore, there is a need to associate and mediate the factor of religiosity in this research.

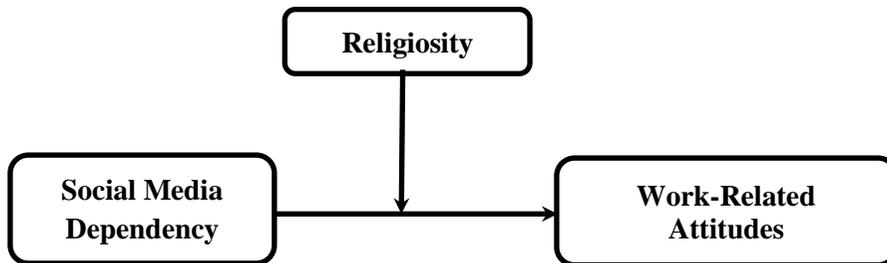
### **Religiosity Mediation**

Liu, Hassan, Chupradit, and Ageli (2021) examined religiosity mediation on the impact of aggressive workplace behavior in the form of workplace harassment, bullying, ostracism, and workplace incivility to check their impact on workers' output and their level of motivation. They discovered that the mediating role of religiosity provides evidence that the negative impact of workplace harassment, bullying, and other subtleties of aggressive workplace behavior can reasonably be lower down through religiosity. Reutter and Bigatti (2014) discovered religiosity had a moderation effect between stress and health. Meanwhile, Nasser and Cheema (2021) discovered that religiosity didn't mediate between empathy, community-mindedness, and forgiveness on Muslim communities in the contexts of Bangladesh, Bosnia, Indonesia, Kenya, Malaysia, Uganda, and Tatarstan (Russia).

## Theoretical Framework

This research theorizes the framework in taking social media as the independent variable, work-related attitudes as the dependent variable, and religiosity as the mediating variable. Figure 1 depicts the research framework.

**Figure 1:** Theoretical Framework



## Hypotheses

This paper derives the following hypotheses, namely 4 main hypotheses H<sub>1</sub>, H<sub>2</sub>, H<sub>3</sub>, and H<sub>4</sub> below:

H<sub>1</sub>: Social media dependency has a positive impact on work-related attitudes among employees in public and private organizations.

H<sub>2</sub>: Social media dependency has a positive impact on religiosity among employees in public and private organizations.

H<sub>3</sub>: Religiosity has a positive impact on work-related attitudes among employees in public and private organizations.

H<sub>4</sub>: Social media dependency has a positive impact on work-related attitudes with the mediation of religiosity among employees in public and private organizations.

## Methodology

Self-administered questionnaires were distributed among employees in the public and private organizations in the following major cities, namely Alor Setar, Georgetown, Ipoh, Kuala Lumpur, Johor Bahru, Kuching, and Kota Kinabalu. The research tools were adapted and adopted from various scholars in the area of social media, work-related attitudes (namely, job satisfaction, career satisfaction, and organizational commitment), and religiosity. The works of Schwartz and Huismans (1995) about social media tool, job satisfaction tool was Weiss and Dawis (1967), career satisfaction tool was from Greenhaus, Parasuraman, and Wormley (1990), organizational commitment tool was from Mowday and Steers (1979), and religiosity tool

was from Gungor, Bornstein, and Phalet (2012). Furthermore, the SPSS is used to analyze correlations analysis, regression analysis, and the mediation impact of religiosity using Baron and Kenny's (1986) approach.

## **Data Analysis**

### **Demographic Analysis**

Table 1 depicts the demographic analysis. Two-third of the respondents were female (n=65, 71.4%) as compared to male respondents (n=26, 28.6%). The respondents indicated that they were married (n=47, 51.6%), and followed by single respondents (n=39, 42.9%) and other status (n=5, 5.5%). The majority of the respondents were aged between 31 to 35 years old (n=36, 39.6%); this was followed by 21 respondents aged between 36 to 40 years old (n=21, 23.1%), 19 respondents (20.9%) were aged between 16 to 30 years old, 6 respondents (6.6%) were aged between 41 to 45 years old, 5 respondents (5.5%) were aged more than 45 years old, and 4 respondents (4.4%) were aged below 25 years old.

Religiously, majority were Muslim (n=68, 74.7%); and followed by Hindu (n=11, 12.1%), Christian (n=7, 7.7%), and Buddha (n=5, 5.5%). Furthermore, respondents indicated their ethnicity, whereby Malays were 65 respondents (73%), Indians were 12 respondents (13.5%), Sikh were 7 respondents (7.9%), and Chinese were 5 respondents (5.6%). The majority of the respondents were employed in the public sector (n=69, 75.8%) as compared to respondents who were employed in the private sector (n=20; 22%) and doing their own business (n=2, 2.2%).

Finally, on their working experience, the majority of the respondents were experienced between 5 to 10 years (n=50, 55.6%); and followed by experienced between 11 to 15 years (n=19, 21.1%), experienced more than 15 years (n=14, 15.6%), and experienced less than 5 years (n=7, 7.8%).

**Table 1: Demographic Analysis**

Item		n	%
Gender	Female	65	71.4
	Male	26	28.6
Marital Status	Single	39	42.9
	Married	47	51.6
	Others	5	5.5
Age (year-old)	Below 25	4	4.4
	16-30	19	20.9
	31-35	36	39.6
	36-40	21	23.1
	41-45	6	6.6
	46 Above	5	5.5
Religion	Muslim	68	74.7
	Christian	7	7.7
	Buddha	5	5.5
	Hindu	11	12.1
Ethnicity	Malay	65	73
	Chinese	5	5.6
	Indian	12	13.5
	Sikh	7	7.9
Employment	Public Sector	69	75.8
	Private Sector	20	22
	Own Business	2	2.2
Working Experience (years)	Less than 5	7	7.8
	5-10	50	55.6
	11-15	19	21.1
	More than 15	14	15.6

### Reliability Analysis

Table 2 depicts the reliability analysis of the variables used. The study shows a reliable value for social media dependency with the Cronbach's alpha of 0.91. This is followed by work-related attitudes with the Cronbach's Alpha of 0.94, and religiosity with the Cronbach's alpha of 0.82.

**Table 2: Reliability Analysis**

Variables	Total Item	Cronbach's Alpha
Social Media Dependency	20	0.91
Work-Related Attitudes	25	0.94
Religiosity	19	0.82

### Correlations Analysis

Table 3 depicts the correlation analysis between variables and their components of work-related attitudes. Overall, there was no significant relationship between variables, namely social media dependency, work-related attitudes, and religiosity.

**Table 3:** Correlations Analysis

Variables		1	2	3
1	Work-Related Attitudes	1	-0.042	0.189
2	Social Media Dependency		1	-0.130
3	Religiosity			1

### Regression Analysis

Table 4 depicts the regression analysis between social media dependency and work-related attitudes. There was no significant ( $B=-0.039$ ,  $p=0.738$ ) impact of social media dependency on work-related attitudes. Thus, hypothesis  $H_1$  was not supported.

**Table 4:** Regression Analysis between Social Media Dependency and Work-Related Attitudes

	Work-Related Attitudes	
	B	Sig.
Social Media Dependency	-0.039	0.738
$R^2$	0.002	
Adj- $R^2$	-0.012	
F-Change	0.113	
Sig. F-Change	0.738	

Table 5 depicts the regression analysis between social media dependency and religiosity. There was no significant ( $B=-0.135$ ,  $p=0.224$ ) impact of social media dependency on religiosity. Thus, hypothesis  $H_3$  was not supported.

**Table 5:** Regression Analysis between Social Media Dependency and Religiosity

	Religiosity	
	B	Sig.
Social Media Dependency	-0.135	0.224
$R^2$	0.018	
Adj- $R^2$	0.006	
F-Change	1.505	
Sig. F-Change	0.224	

Table 6 depicts the regression analysis between religiosity and work-related attitudes. There was a significant impact ( $B=0.189$ ,  $p=0.100$ ) of religiosity on work-related attitudes. Thus, hypothesis  $H_2$  was supported.

**Table 6:** Regression Analysis between Religiosity and Work-Related Attitudes

	Work-Related Attitudes	
	B	Sig.
Religiosity	0.189	0.100
R <sup>2</sup>	0.036	
Adj-R <sup>2</sup>	0.023	
F-Change	2.767	
Sig. F-Change	0.100	

**Mediation Analysis**

Table 7 depicts the mediation analysis of religiosity between social media dependency and work-related attitudes. There was no significant mediation (B=0.187, p=0.112) impact of religiosity between social media dependency toward work-related attitudes. Thus, hypothesis H<sub>4</sub> was not supported.

**Table 7:** Mediation Analysis of Religiosity toward Social Media Dependency and Work-Related Attitudes

	Without Mediation		With Mediation	
	Work-Related Attitudes		Work-Related Attitudes	
	B	Sig.	B	Sig.
Social Media Dependency	-0.039	0.738	-0.014	0.906
Religiosity			0.187	0.112
R <sup>2</sup>	0.002		0.036	
Adj-R <sup>2</sup>	-0.012		0.009	
F-Change	0.113		2.593	
Sig. F-Change	0.738		0.112	

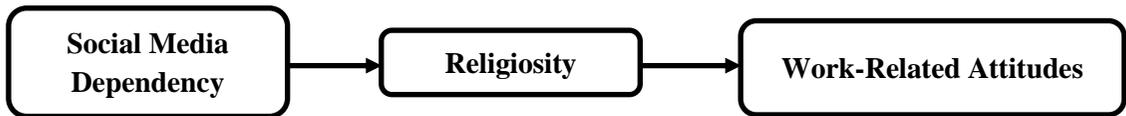
In summary, Table 8 depicts the regression analysis and mediation analysis between variables, namely social media dependency, work-related attitudes, and religiosity.

Hypothesis	Result
H <sub>1</sub> : Social media dependency has a positive impact on work-related attitudes among employees in public and private organizations.	Not Supported
H <sub>2</sub> : Social media dependency has a positive impact on religiosity among employees in public and private organizations.	Not Supported
H <sub>3</sub> : Religiosity has a positive impact on work-related attitudes among employees in public and private organizations.	Supported
H <sub>4</sub> : Social media dependency has a positive impact on work-related attitudes with the mediation of religiosity among employees in public and private organizations.	No Mediation

### Moderation Analysis

Due to no mediation impact of religiosity between social media dependency and work-related attitudes, moderation analysis was conducted as further analysis in exploring the possibility of moderation impact of religiosity between social media dependency and work-related attitudes. Figure 2 depicts the moderation framework.

**Figure 2:** Moderation Framework



Furthermore, the following hypothesis on moderation is as below:

H<sub>5</sub>: Social media dependency has a positive impact on work-related attitudes with the moderation of religiosity among employees in public and private organizations.

Table 8 depicts the moderation analysis of religiosity between social media dependency and work-related attitudes. There was no significant moderation (B=0.449, p=0.728) impact of religiosity on social media dependency toward work-related attitudes. Thus, hypothesis H<sub>4</sub> was not supported.

**Table 8:** Moderation Analysis of Religiosity toward Social Media Dependency and Work-Related Attitudes

	Without Moderation		With Moderation	
	Work-Related Attitudes		Work-Related Attitudes	
	B	Sig.	B	Sig.
Social Media Dependency	-0.014	0.187	-0.455	0.721
Religiosity	0.187	0.114	0.031	0.947
Social Media Dependency-Religiosity (Dummy)			0.449	0.728
R <sup>2</sup>	0.036		0.037	
Adj-R <sup>2</sup>	0.009		-0.003	
F-Change	1.335		0.122	
Sig. F-Change	0.269		0.728	

Interestingly, the data output stated that no moderation of religiosity was found between social media dependency and work-related attitudes on employees in public and private organizations.

Hypothesis	Result
H <sub>5</sub> : Social media dependency has a positive impact on work-related attitudes with the moderation of religiosity among employees in public and private organizations.	No Moderation

## **Discussions & Conclusion**

This research had a novel intention for the body of knowledge, especially toward the government's vision on TN50 (2020-2050), on the employee's involvement in the social media that impacted their work-related attitudes, namely job satisfaction, career satisfaction, and organizational commitment. Moreover, the mediation of religiosity would be an added advantage for the policymakers of TN50 to be embedded in their implementation. Undoubtedly, the Ministry of Human Resources would be at the advantage of knowing how to lay out the nation's landscape of the future employees in terms of having a balanced work-life and family-life. As for the Malaysian Communication and Multimedia Commission (MCMC), the research knowledge would assist them in putting "invisible barriers" among employees in the public and private organizations on their involvement in social media. Finally, the information on the mediator of religiosity would be an advantage for various religious organizations at the ministry and state government levels in planning specific moral and religious programs for citizens of the nation.

This paper discovers that religiosity has an impact on work-related attitudes among employees in public and private organizations. Moreover, this is interesting as it reflected the nation's diversity in religious beliefs, namely Muslim, Christian, Buddha, and Hindu. The religiosity of individual employees had an impact on their work-related attitudes. This clearly can be associated with the most religious teachings that every individual should do good deeds not just to one-self but also to others. In this paper, the religiosity impact on employees' work-related attitudes is obvious. This has been confirmed by Ekizler and Galifanova (2020) that the role of religion in the working environment has a possible influence on work values among employees in various companies located in Istanbul, Turkey. In a systematic review, a group of researchers develop a research agenda and offer recommendations for management practice that focus on support for the expression of religious identity at work while maintaining a broader climate of inclusion (Heliot, Gleibs, Coyle, Rousseau & Rojon, 2020). Moreover, a positive and significant relationship between religiosity and job attitude with organizational behavior (Ramlee, Osman, Salahudin, Sin, Sim, Safizal, 2016). Roznowski and Zarzycka (2020) state that religiosity is a source of motivation to engage at work for women, whereas, for men, high religiosity can reduce engagement in work. Meanwhile, Wisker and Rosinaite (2016) discovers that the level of religiosity however was not found to affect Islamic work ethics directly but through the behavior and personality of Muslim managers.

On the other hand, social media dependency has no impact on the employees' work-related attitudes. This study discovers that the employees' involvement in social media has not impacted their work-related attitudes.

Thus, these employees would perform their level best of their work regardless of the number of hours or level of intensity on their involvement in social media. This is supported by Hawi and Samaha (2017) that addictive use of social media had a negative association with self-esteem, and the latter had a positive association with satisfaction with life. Meanwhile, Schmidt, Lelchook, and Martin (2016) purport that social media connections have a significant positive relationship with both perceptions of organizational support and organizational spontaneity. This concludes that the degree of social media dependency has no impact on employees' work-related attitudes.

The study also discovers that social media dependency has no impact on the employees' religiosity. In this situation, regardless of the employees' involvement in their social media, their level of religiosity has not been impacted by it. Thus, this situation is seen that employees are considered as responsible individuals on their religious commitments. This is supported by Turan's (2018) results from perceptions of individual religiousness and social media use. Conversely, religiosity significantly predicted ethnic media use among British Muslims (Croucher, Oommen, Borton, Anarbaeva & Turner, 2010). Sanaktekin, Aslanbay, and Gorgulu (2013) reveal that the level of religiosity has a significant effect on the patterns of Internet consumption among Turkish.

Furthermore, the paper discovers no mediation on religiosity between social media dependency toward work-related attitudes. Subsequently, the paper also discovered no moderation on religiosity toward social media dependency and work-related attitudes. Interestingly, the degree of religiosity has no mediation and moderation impact between social media dependency toward work-related attitudes on employees. This contradicts with Almenayes (2014) states that religiosity shielded individuals from negative consequences of social media usage. Furthermore, Almenayes (2015) states that religiosity protects against the social consequences of social media.

In conclusion, this study discovers that religiosity has no degree of impact, mediation, and moderation among employees in the public and private organizations on their social media dependency and work-related attitudes. As such, it can be said that the above employees are considered socially responsible for their social media involvement. Thus, they also have a high value on their work-related attitudes that place a substantial focus on their works and organizations. Meanwhile, religiosity in a multiracial country, Malaysia, has solid and sound grounds for employees in the country toward their social media involvement and works.

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## Digital Technologies and Social Media in Tourism

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### Abstract

Computer-mediated technologies allow individuals, companies, nongovernmental organizations, governments, and other organizations to view, create, and share information, ideas, career interests in virtual communities and networks. For the tourism industry it is essential to create interesting content on social media at all stages of the journey. The aim of the paper was to highlight the role of social media in the tourism industry, to reveal how mobile applications affect tourism, and how tourists benefit from using social networks while traveling. The purpose was to show the best practices in promoting consumer relations through social media and social media channels, and what role social media plays in many aspects of tourism, especially in terms of information retrieval and decision making. The research revealed which search engine Georgian tourists use to get information throughout their travel and whether they usually use social media platforms to buy a tourism product. Using qualitative and quantitative (population-based) methods, the results of the study showed that travellers in Georgia actively use social media for ideas and inspiration, at the same time to buy tourism products. Social media is not just about disseminating information, it can also influence tourists' expectations and decisions. The research shows the importance of an online tourism domain in the context of travel planning through a search engine. Therefore, stakeholders in the tourism industry should pay attention to the impact of social media to improve the reliability of their information and services.

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**Keywords:** Mobile communications, social media, tourism products, region of Georgia

## **Introduction**

Influence of technology has changed the way human activities are performed, the mobilization of tangible and intangible resources, the creation and acquisition of business opportunities. The widespread use of the Internet and the rapid technological evolution have revolutionized all the industries of the world, especially tourism. Nowadays, the tourism platform is becoming more and more boundless on the Internet, which is essential because tourism is an information-based industry. Travelers gather a lot of information about the tourist product and the characteristics of the trip. In addition, proper information about the chosen destination can improve travellers' confidence in the decision-making process, help them make the best decision and at the same time increase the quality of the trip. Technological advances have forced communities to use social media, which offers websites and online applications that allow users to take advantage of various social media features such as communication, sharing, collaboration, publishing and more. Social media includes social networks, customer reviews, various content sites, internet forums, and more. Social media has emerged as a new way for people to socialize with each other, through information and communication technologies such as mobile and internet-based technologies. It's actually more than just a new way of communicating. It is a whole online environment built on the relationship and integration of participants. In many countries, social media is considered as an important tool for popularizing the tourism industry and therefore it is thought that the importance of social media and its impact should be taken into account by any sector in the tourism industry. Social media offers new ways for tourism organizations to implement their business models and operations. Nowadays tourists use social media to get information and this should be taken into account by individuals working in the tourism sector to take advantage of the positive aspects of social media and create an appropriate image.

## **Literature Review**

Tourism, as a service industry, has discovered the impact of information on tourism experiences. The tourism industry has always embraced the growth of new technologies, such as computer booking systems (CRS), global distribution systems (GDS), and the Internet. The dynamic structure of the industry allows both manufacturers and consumers to respond immediately to events. "Experience" and "value" are two special concepts for the modern tourism industry. According to a decision-making study, the buying process consists of five stages: need identification, information retrieval, evaluation of alternatives, purchasing decision, and post-purchase behaviour. Tourism companies try to combine different marketing techniques and realize the importance of sending the right messages through the proper

media channels. (Živković, 2014) Launching of modern internet technologies have redefined the marketing rules around the world. It develops and maintains long-term relationships with different parties in the market. One of the main reasons for the success of digital marketing vs. traditional marketing is the fact that the former allows businesses to track user behaviour in real-time. Every campaign launched digitally can be tracked in terms of its reach, engagement and conversion. This has given a whole new meaning to the marketing research to understand the needs of the customers like never before. (Kaur, 2017)

Travel planning begins with identifying needs that may arise from internal and external stimuli. Therefore, previous experience pushes the customer towards a specific product. Moreover, other people's suggestions, advertisements or other marketing incentives can affect the user in identifying which activities may meet this need.

After getting to know their needs, people try to find information about goods and services that can meet their needs. Users typically use both personal and non-personal sources to get thorough information about personal information coming face to face (WOM), which is disseminated by family, friends, neighbours, colleagues and other resources.

Collecting information online is possible from users who post and share their experiences directly on their social media, or simply from other people's profiles (friends, bloggers), corporate websites, blogs, or social media pages. Therefore, online information can be obtained by firms on the pages of their corporate websites, blogs, social media. For instance, online ads published on TripAdvisor, the content, messages posted on a travel blog, or various types of content (textual, visual) that companies publish on online channels. With the spread of social media, firms can also communicate with users directly through their personal profiles on social media. For example, Facebook users who "like" a brand page will receive posts directly containing specific information, which in turn can be shared with their network of friends (featured messages). In this case, the information provided by the firm can engage users who have a desire to share it, and it can already become the personal information of friends, as this action is reflected on their personal page. In addition, social media offers the opportunity to advertise to different target markets. Finally, online information can come from associations, travel clubs and third-party travel guides that offer official ratings, hotel information, destination and attraction descriptions, and more. (e.g., Forbes Travel Guide, American Automobile Association-AAA, Lonely Planet, etc.).

After evaluating the various alternatives, the consumer decides whether or not to purchase a particular product. Sometimes purchasing goals can be influenced by other factors that are not controlled by the company: the attitude of others and the situational surprises can influence the final decision

of the purchase. Such as, the behaviour of other family members may influence a vacation decision, or an unexpected expense may influence a vacation decision, or simply a choice of destination. Also, in the case of a real purchase decision, the risk may be retained as the customer generally books or buys the service in relation to the actual vacation period. In this case, especially when there is a certain time between the order / purchase action and the actual consumption, the post-purchase behaviour plays an important role, as the customer can try to find items that will be able to make sure of the decision made.

Given this characteristic of travel services, post-purchase behaviours can be divided into post-decision and post-consumption behaviours (Kotler, Armstrong, 2001). This distinction is particularly important because the influence of other sources of information or situational factors may influence the subsequent decision-making process. After the completion of the consumer procurement process, a further stage of consumption takes place, in which the quality of service is evaluated. In particular, consumers compare expectations and perceptions as a progressive process, starting from the first stage of the booking process, and make a final decision that takes into account perceived service quality, price paid, personal factors and situational factors. Based on satisfaction and dissatisfaction assessments, consumers can disseminate positive or negative information and decide whether to become loyal. In case of cognitive dissonance, which comes from the infallibility caused by the post-purchase conflict, the customer may stop buying the product or express dissatisfaction and take steps to reduce the dissonance. (Kotler, Armstrong, 2001)

Thus, given the impact that social media has on tourism and tourism products in general, it is also an effective digital marketing tool. Representatives of the tourism industry should consider all five stages discussed above and decide how the traveller behaves at each stage.

Increased mobility has gone hand in hand with the immediacy of information now routinely available via digital media. Through online travel agencies (OTA) such as booking.com and Trivago, and on peer-to-peer booking sites such as Airbnb, we can curate our travel experiences anywhere in the world at a click of a mouse, or tap on a smartphone. We can search for package deals, make travel reservations with airlines, train and ferry operators, search out nearby points of interest, check the current weather conditions, and read up on the local news. (Nuenen, Scarles, 2021)

In Georgia, social media started to develop through online chats. This was followed by the popularization of forums where people were already writing their opinions openly and it was possible for others to read it, it was already allowing users to share their experiences with each other. Various social media have been gradually developed in Georgia as well as around the

world. At the same time, social media marketing is constantly evolving and it is an important factor for companies to make appropriate choices. Consequently, social media allows opportunities for advertising, so organizations need to thoroughly research the target market before launching an active advertising campaign.

Nowadays, it can be said that using social media is a choice but also an obligation to a certain extent. It allows users to be constantly involved in the news, with the opportunity to use various social media tools at any time. In today's world there are online platforms without which it is virtually impossible to plan a trip. The development of technology directly allows the customer to plan the trip themselves. The development of modern digital technologies not only makes travel convenient, but also plays an essential role in the development of tourism business. Developments based on digital technologies are expanding the boundaries of the new world with unique features and dynamics. The ability of a company to survive in such an environment and to meet the needs and expectations of its customers depends on understanding the rules of the digital world and acting accordingly. In other words, companies that know the impact of rapidly evolving social media networks and mobile devices on consumers' lifestyles, consumption habits, and consumer behaviour should also be aware that they need to periodically review strategies to keep pace with such global developments.

Technological development has brought innovations to the tourism industry, just as it does in all other industries. Mobile communication is becoming a part of everyday life. The tourism industry, like all other industries, is influenced by the achievements of modern mobile communication. In today's world, airlines, travel agencies, tour operators and hosting businesses are developing mobile apps and new business processes that leverage mobile technologies. The popularity of mobile personal communication devices in the tourism industry has responded in the form of programs and services to move traditional tourism services to the mobile domain. All these developments have led to the widespread use of mobile communication devices instead of computers in the field of tourism. Nowadays the consumers' intention to adopt mobile applications (m-apps) as another means in purchasing tourism-related products and services via their mobile devices is huge. (Tan, Lee, Lin, Ooi, 2017)

There are different types of mobile apps for smartphones, tablets, as well as apps created for Android and iOS systems. The mobile app also makes a big contribution to growing a company's image, attracting new customers or selling products. This is the latest technology that makes it as comfortable as possible to receive information and use a product or service. One of the goals of the app is its commerciality, which increases the sales rate, as well as increases the number of users, as convenience for some users is a priority. In

addition, mobile applications allow us to collect user data, for certain services the system asks the user to enter personal data, which is used for further analysis and further personal offers.

Currently mobile communication is a concept that is fundamentally important for tourists and the tourism business. Through mobile apps, today's tourists have the opportunity to meet needs that were previously needed from travel agencies, guides or print guides or maps. Using mobile devices, they can book hotels, purchase tickets to events, and conduct guided tours to various destinations, as well as many travel services that traditionally require human relationships. This is convenient for the tourism business as a lower cost and, ultimately, better quality cooperation can be found for both parties. One of the biggest benefits of the mobile internet is that tourists can exchange information when they want to access the information they need during the trip. Also, with the integration of artificial intelligence into mobile computing, tourists and tourism businesses have gained advantages in all processes of traveling. (Türkmendağ, 2022)

Mobile communications have created a dynamic and stimulus for new and unique transformations in the context of social media. In today's world, the sustainability of the tourism business depends on adapting to mobile communications to meet the needs and expectations of consumers. In other words, a business that fails to adapt to the new world through processes and strategies will face greater challenges in the future. The new virtual environment created by these technologies is no longer considered a simple simulation of the real world, but rather becomes an alternative place of interaction in the real world. (Sezgin and Aktas, 2016) Businesses that want to take their place in this new world must constantly monitor and adapt to developments and innovations in the field of mobile communications. Therefore, all participants in the mobile communications value chain need to better understand their roles and positions.

## **Methods**

Qualitative research methods and review of scientific literature were considered necessary to reveal the main features of mobile applications and communications in tourism, including the steps of the buying process that customers experience. The use of secondary sources and statistics became necessary for the analysis of quantitative research conducted by TripAdvisor, because it is a very popular website in the world and a lot of tourists use the information spread by the website. Finally, a quantitative, population-based survey was conducted to identify Georgian travelers' behaviour while purchasing tourism products through social media channels. The survey was spread by social media, the questionnaire was uploaded to the group on Facebook called "Traveller's Club", which unites up to 170,000 users. About

five hundred people participated voluntarily in the survey. The survey was conducted in January 2021 and the questionnaire consisted of only three questions, where respondents had to express their preferences on the listed issues. These issues were about using social media and mobile apps when travelers are planning a vacation.

## Results and Discussion

TripAdvisor is the world's largest travel platform headquartered in Massachusetts. TripAdvisor's branded sites and forums operate as online travel guides that offer users a free overview of travel-related content. Founded in 2000, TripAdvisor has become one of the most popular travel and accommodation websites in the United States. In 2018, the website already had approximately 730 million user reviews and opinions, which included a list of more than eight million restaurants, hotels, rentals and tourist attractions. Due to the growing number and variety of global internet users who publish reviews online, many modern travellers now use TripAdvisor to choose a vacation home and get travel related tips. TripAdvisor conducted a quantitative online survey of 2025 users over the age of 18 in the spring of 2019. The subject of research interest was the use of mobile phones by consumers to get travel ideas and inspirations. 36.5 percent of respondents said they used social media websites for travel inspiration or ideas. In addition to social media, what ways do travellers use to obtain information is shown in Diagram 1.

**Diagram 1-** Using a mobile phone for holiday inspiration in the US in Spring 2019

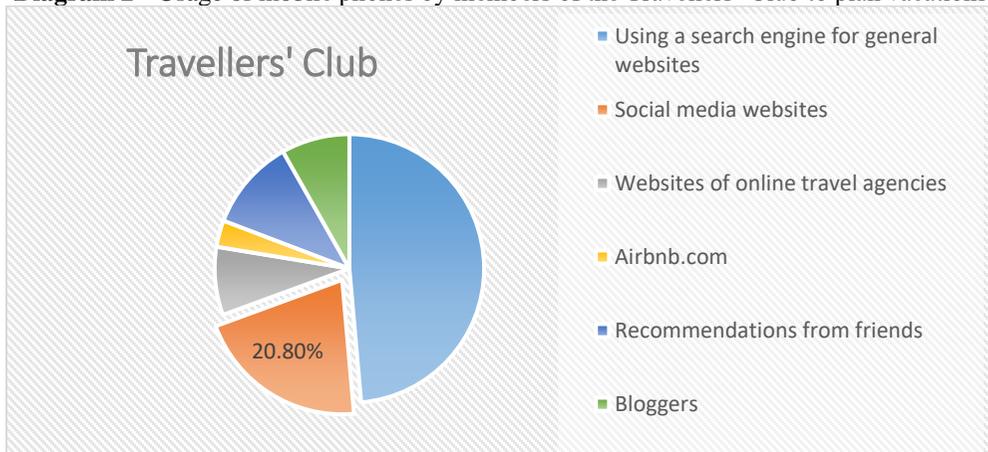


Source: <https://www.statista.com/topics/3443/tripadvisor/>

Naturally, Georgian travellers also use various online means when planning a trip and getting information. There is a popular group on Facebook called "Travelers Club", which unites up to 170,000 users. This group is an

opportunity to share cheap travel information and not only with each other. We tried to conduct a small-scale online survey like TripAdvisor. A population-based research methodological approach was used for the research. According to the quantitative research, it should have revealed the ways in which Georgian tourists search for information when planning a trip via mobile phone. And also, whether they have purchased any travel product using any of the social media platforms. Five hundred people over the age of 18 participated in the online study. The survey found that 20.8 percent use social media for travel inspiration or ideas. It was also interesting to see what other options Georgian travellers use to obtain the information they want, as shown in the diagram 2.

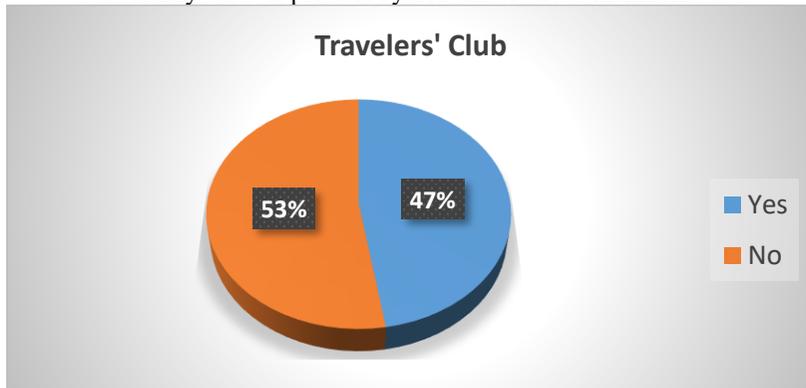
**Diagram 2** - Usage of mobile phones by members of the Travellers' Club to plan vacations



Source: Author's research

As for the answer to the question, whether any of the social media platforms respondents had used to buy a tourism product, 47.4 percent agreed with the question, which is shown in the diagram 3. This once again demonstrates the importance of using social media to promote tourism products and attract customers.

**Diagram 3-** Usage a social media platform to buy a travel product by Travellers' Club members



Source: Author's research

Through the existing diagrams we can judge that no less Georgian traveller uses social media to plan travel compared to foreign tourists. Also, both Georgian and foreign tourists trust bloggers with almost the same percentage. (7.2% and 8.2%) As for the use of a general search engine, most Georgian and foreign tourists choose it. (69% and 48.6%)

Although this study is not large-scale, it provides a general idea of the importance of social media for Georgian tourists, as well as for companies to see why they should pay attention to social media platforms. My goal was to highlight the role and importance of social media in the field of tourism. Since today, the tourism business is virtually completely digitized, the introduction of digital marketing in Georgian companies can bring many benefits. This will affect the development of companies, enable them to easily solve problems that arise, investigate customer behavior, track and analyze customer numbers, gain information about competitors, and create a brand image that in itself will attract customers. In order to maintain the pace of tourism development in Georgia, it is necessary to focus on modern technologies and face the challenges of the world.

## Conclusion

To summarize, the use of the Internet and other information and communication technologies is ushering in a new era of global economy. Social media continues to grow and has an increasing impact on many social and economic aspects of the tourism and hospitality industry. Social media fundamentally changes the way travellers and tourists search, find and trust, as well as provide the greatest information about tourism providers and tourist destinations. Social media provides new ways for tourism organizations to implement their business models and operations. Numerous studies show that tourists use social media to get information at least, and this should be taken

into account by individuals working in the tourism sector and tourism establishments, to take advantage of the positive aspects of social media and create an appropriate image. It is an important component for an online tourism domain in the context of search engine optimization. Social media fundamentally changes the ways of search, finding and trust by travellers and tourists, as well as gives us the greatest information about tourism providers and tourist destinations. The research shows how important the use of social media is in the tourism sector. Therefore, stakeholders in the tourism industry should pay attention to the impact of social media to improve the reliability of their information and services. The results of the study will be interesting for individuals or organizations working in the field of tourism who already use or plan to integrate social media into their sector. Further research should explore in depth the various models of social media and expose decision theories to gain a better travel experience. This paper was an attempt to highlight the importance of advances in information and communication technologies, the impact of social media in the field of tourism, and how it can be used to build better relationships with audiences.

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## Harassment of Women in University and Public Transport

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### Abstract

The present study was conducted to find out the existing problems of university and public transport from the perspective of females in Abdul Wali Khan University Mardan, KP, Pakistan. The study examines the issue of harassment in university and public transport the female faces every day. The study uses the quantitative method and random sampling, which belongs to probability sampling—the data collected from the study area through the questionnaire. The study shows that students and employees were 18 to 31 years old in which majority of the female's faces problems in public transport and few were faced problems in university transport. The study shows that the female passenger was unwilling to use public transport. They found it the most unattractive mode of transportation. Moreover, the study shows that most females reported facing the misbehaviour of drivers and co-passengers. The female passengers do not want to use public transport to avoid unpleasant situations. They also feel unsafe from drivers because they make rude remarks behind them, harass them, and miss their behaviour. Most of them want to act against the harassers, but they are afraid, and those who are harassed do not complain to the higher authorities because they think it can affect their self-respect and reputation. Further studies need to be conducted to get more information about public and university transport harassment.

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**Keywords:** Harassment, Sexual harassment, sexual assault, harassment in public transport

## **Introduction**

Harassment is one of the most severe issues in the world nowadays. Every woman in the world experience harassment daily or once and twice a week. In public transport, harassment is the most common issue that female faces every day. Harassment can have short-term or long-term effects on their lives. Studies show that approximately 70% of Pakistani women use public transport in Pakistan. They face harassment every day of which 75% of women reported the offender was another anonymous passenger, 20% said that the offender was a conductor, and 5% of women reported that the offender was a driver (Asian Development Bank, 2014). As demonstrated here women feel unsafe during public transport due to the fear of harassment. Therefore, harassment in public transport is labeled as a global issue. Particularly two-thirds of Pakistani women experienced such incidents, most of which are not reported. Studies show that harassment is a common experience for women in public transport. Most of the young female passengers said that they had been harassed all the time in public transport in which some females faced sexual harassment, which caused both social and psychological effects on their lives. The harassment of women in public and university transport assesses them in conditions of their short and long-term consequences.

Consequently, it is not essential to address the advantages of successful policies regarding their safety and protection. However, it is the right of women to feel safe when entering public space without threats and fear of harassment. The potential and confidence of women create empowerment opportunities for others. According to the study of Rachel Wilder (2018) that harassment in public transportation affects the lives of working women and female students. It also stated that harassment is mainly prevalent as in the case of South Asia, it might control women who depend on public transport for traveling; if these effects take off, then it will hold the essential consequences for policymakers whose purpose to improve social equality by increasing women contribution (Wilder,2018). Nearly all the information that is gathered focuses on harassment in public transport.

Harassment of women is particularly prevalent and has negatively impacted women's workplace efficiency, emotionality, and relations with family (Celik & Celik, 2007; Pryor, 1995). When others ignore these actions of harassment, it will cause long and lasting effects for women (psychological and physical effects on the wellbeing of females and the perpetrator (increased insensitivity to violent behaviour against women). Therefore, some studies show that there are many behaviours that women experience in public places, including public transport in which they usually are harassed in public spaces/public transport includes verbal and non-verbal behaviours ranging from rude remarks, touching, groping, catcalls, whistling, assaults, and obstructing female commuters' way (Asian Development Bank, 2014).

In all cases, the women claim that these actions should be gathered with more severe persecution, such as sexual assault and rape, that significantly impact women's lives. Most of the studies are based on working women and university students, which shows that women learn to navigate when they are delivered to the transport organizations of their city and imitates the mechanisms women use to create safer experiences for themselves (Korn, 2018). Mostly *harassment* in public transport is defined as "an action or comment, motivated by gender or sexual orientation or gender expression between strangers in public transport that is unwelcome, disrespectful, threatening and harassing." Though harassment includes a wide variety of behaviours, signs, and remarks, it also has some characteristics: like the harassers are male, and the target of harassment are women, the harassers are unaware of their targets; the encounter is always face to face; and forum in public places, transport such as taxis, buses, bus stations or any other site where public generally access (Asian Development Bank, 2014).

Considering the above facts, it is essential to conduct studies on harassment in public and university transport. Most previous studies are conducted in other countries, and few studies are conducted in South Asia, especially in Pakistan. Few studies have examined harassment in Pakistan, and therefore there is a gap in the existing literature. This study investigates harassment in public and university transport in Pakistan, Khyber Pakhtunkhwa Mardan. Mardan city is located in the southwest of Khyber Pakhtunkhwa. The reason for harassment is twofold. First, there has been a substantial increase in the issue of harassment in both public and university transport in recent years, as reported by many agencies, although no official data are available. Second, there is a lack of research on the particular topic; therefore, there is a gap in the current literature.

## **Literature Review**

The review of existing literature from around the world in which Pakistan points to a high rate of harassment in public transport. In this regard, the feminist theory fitted well on the issue of harassment. The feminist theory presents the right of human beings. There are four types of feminism that includes liberal feminism, radical feminism, Marxist or socialist feminism, and cultural feminism. Among these, the liberal feminist's theory fitted well with this research which is presented by Mary Astell (1666-1731), Mary Wollstonecraft (1759-99), John Stuart Mill (1806-73), Elizabeth Cady Stanton (1815-1902), Harriet Taylor (1807-58) and Virginia Woolf (1882-1941). According to liberal feminists, freedom is the fundamental right of human beings. "Liberal feminists share this point of view and insist on the freedom of women" Liberals disagree on what freedom is articulated, and it can take many forms more than one. "Liberal feminism conceives freedom as

personal autonomy (Living a life of own choice and political autonomy (being a co-author of the conditions in which one lives") (Stanford Encyclopaedia of Philosophy-2007). Women have the freedom to her life to live as their own. Still, it depends on certain conditions that are not sufficient to exercise personal autonomy, or the social formation does not respect the individual sovereignty of women and other elements of the flourishing of women.

Harassment and Sexual Harassment are common issues in public transport. Sexual harassment and assaults on public transport are on the international agenda. The behaviours involved can range from relatively mild to very severe. These include, but are not limited to, lewd comments, boos, sarcastic looks, innuendo, sexual invitations, threats, viewing pornography, staring, being followed, or photographed, masturbation, rubbing, unwanted sexual contact, and rape. (Guardian Project, 2013) The researchers describe accessibility to transportation as a necessary precondition for accessibility to the workplace, and those who use public transportation due to the unavailability of any other option, such as "captive cyclists" or "prisoners in transit (Dear & Wolch, 1989)." Research shows that women comprise a higher percentage of captive riders than men. For these women, access to public transport is essential since it allows them access to work, educational and leisure opportunities, and the public sphere in general (Smith, 2008). Overcrowding and isolation are also vital characteristics that can promote harassment. For example, crowded and crowded rush hour conditions can make it easier to rub against a woman in an underground car.

According to the study of Aredener (1981) the separation between public and private spaces ensures that women remain within the domestic sphere of the home and family. They Maintain their dependence on men, with their helplessness and preserve the system of inequality (Bandyopadhyay & Khan, 2003: Raju 2011; Kelkar 1992). In women's lives, public harassment abuses are frequent reminders of the ever-present importance of their gender. With no history of public places, gender norms must be constantly established and implemented. Public harassment reinforces the fundamental division between the sexes and prescribes the conduct or mere presence while punishing others (Gardner, 1995).

Studies that show the effects of harassment at work found that women who were harassed reported a higher frequency of absenteeism at work than those who were not harassed (Fitzgerald et al., 1997). However, women are shorter in height and have less physical strength than men. Women are more vulnerable to attack harassment than men. Women's increased concern for personal safety has necessary implications for bus and train design, transport interchanges, waiting areas, and the manning of individuals. Women often see the problem of harassment in public spaces as evoking significant issues in their relationships with men, as men often see them as an evocation of their

own perceived gender dilemmas. Hence, few women have practiced gender-specific of unknown men with anything like the same sense of rights, freedom, and impartiality that men show and the assault that adolescents or young women sometimes commit in groups (Gardner, 1995). The literature suggests that the consequences of the risk or experience of bullying in public transport can profoundly affect women's lives everywhere. Since transportation is a critical factor in mobility, bullying restricts their mobility. It, therefore, limits their access not only to educational and job opportunities but also to socialization and recreation activities (Asian Development Bank, 2014).

Besides causing harm and suffering, it is suggested that VAW (violence against women) also fulfills several other functions, such as "maintaining the system, asserting power, exploitation and victimization" (Gupta, 2006). subordination of women by men (Poonacha,1991; Mathur, 2004) and the violation of women's freedom by the assumption of control by men over their bodies, altering conceptions of individuality and sovereignty (Menon, 2000).

The Ngo's activism and awareness-raising encouraged women to speak out, thus discovering previously hidden crimes of VAW (violence against women). However, it is argued that more actions are needed if more profound social transformation is achieved (Wanasundera,2000). Arguably, while they do not have an immediate effect on the likelihood of women being harassed on public transport, as is possible with gender segregation, these strategies seek to ensure that society takes responsibility for addressing and preventing harassment. While this includes women, the responsibility ultimately does not lie with them alone (Harrison, 2012).

It is tricky to establish the extent to which harassment occurs in public transport and connected spaces or estimate its incidence. For example, studies indicate that such harassment is widespread; it has been noted that these studies seek answers only from those who have experienced sexual harassment and therefore found inflated incidence rates. At the same time, it is also argued that bullying rates may be underestimated because many women are conditioned to accept bullying as "normal" and not report it. However, whatever opinion that adheres to, there is no doubt that bullying is prevalent in public transportation and connected spaces (Asian Development Bank, 2014).

A study on the psychological impact of sexual harassment on white and Asian women indicated that a higher frequency of sexual harassment and post-traumatic stress symptoms "preached" more depression and general psychological distress among women (Ho et al., 2012), as well as women, feel angry, offended, annoyed, anxious, weak, humiliated, nervous, and objectified (Dhillon & Bakaya, 2014). They may experience intense fear, sleep disturbances, and nightmares (Battered Women's Support Services, 2014). In

short, "the direct physical and emotional impact on victims cannot be underestimated" (NYPD Transit Bureau, n.d., p3).

Perhaps the most fundamental behavioural effect of experiencing unwanted sexual behaviours is the impact on mobility (Loukaitou-Sideris, 2014). Such experiences, or the fear of them, can make women feel that they must adopt self-protection strategies, such as altering the clothes they wear (Fahmy et al., 2014) or positioning themselves in specific ways, such as leaning against walls so that no one is behind them (Rossi, 2014). Some women also reported putting luggage between themselves and other passengers, adopting "deadpan" expressions, avoiding eye contact, traveling with a male partner (Dhillon & Bakaya, 2014), and traveling in groups (Tulloch, 2000).

The literature suggests that the risk or experience of harassment on public transportation can profoundly affect women's lives everywhere. Since transportation is a critical factor in mobility, harassment restricts their mobility and limits their access to educational and job opportunities and socialization and recreation activities.

Those women who men in public transport harass, are academic, and work-life can also affect their behaviour; they can stop going to work and university. Researchers say that women who experience sexual harassment indicate more depression and psychological distress. However, sexual harassment on public transportation appears to be a growing problem. Finally, by focusing on women as victims of bullying, this review did not cover the motivating factors behind bullying or understanding of the bullying experience of men. It would be helpful to do more research in these fields to provide more perspectives for a better understanding of public transport harassment and women's travel behaviour.

## **Research Methods**

In this study, the researcher used the quantitative research method. Quantitative research collects and analyses numerical data. It can be used to find patterns and means, make predictions, causal test relationships, and generalize results to larger populations (Neuman, 2006).

## **Sampling and Recruitment Strategies**

The researcher used random sampling to develop the research sample under discussion in this study. Random sampling belongs to the category of probability sampling, in which representatives from a larger population are chosen using a method based on the theory of probability. As the name suggests, random selection is an entirely unexpected method of selecting the sample. This sampling method is as easy as assigning numbers to the individuals (model) and then randomly choosing from those numbers through

an automated process. Finally, the numbers that were chosen were the members included in the sample ( Neuman, 2006). According to this method, respondents were randomly selected based on their understanding. The researcher randomly selected 50 respondents in Abdul Wali Khan University- Main Campus in this study.

### **Tool of data collection**

A *tool* is a source from which data is collected from a respondent in the field. Quantitative data have been collected by conducting a primary survey. The researcher collected data through a questionnaire survey from the study area.

### **Limitations**

There are several limitations linked with this study. The first limitation is that this study was built on the quantitative method, which focuses on the broader picture. At the same time, qualitative research would allow more in-depth information about harassment in university and public transport. Second, the limitation of the study is that the sample size is minimal. Therefore, further studies should focus on a larger sample size.

### **Results**

A total of 50 respondents completed the questionnaire. The data suggests that most of the respondents were young belongs to the age group of 18-28, and few belonged to the age group of 28-31, thus demonstrating that 90 percent of respondents belonged to urban areas (e.g., Cities) and 10 percent belongs to rural areas (e.g., villages). All the respondents were from Mardan, KP, Pakistan, and share the same culture and religious background. Out of 50 respondents, 92 percent were students, 8 percent were employees, 68 percent were bachelor's students, 24 percent were master's students, and 8 percent were employees at AWKUM.

In this paper, the result showed that most women use public transport to travel to workplaces, travel for educational purposes, or for personal goals, of which 64 percent of women use university transport, and 36 percent of respondents use public transport. When the respondents were asked about public or university transport safety, 82 percent reported that university transport is safe for females. The other 18 percent stated that university transport is not secure, whereas 98 percent of respondents said that local/public transport is not safe for females. Approximately 44 percent of females reported that they experience harassment (catcalls, stares, sexist remarks, touching, and sexual jokes.) from both drivers and co-male passengers. 24 percent of respondents were only harassed by drivers in both public and university transport, and 32 percent of respondents were sexually

harassed by drivers and co-male passengers when traveling in public transport.

Results show that 32 percent of respondents report that they face sexual harassment in public transport, 44 percent never experienced sexual harassment, and the rest of 24 percent were unsure about sexual harassment in public transport. When were the respondents asked about their attendance that is harassment affect their attendance at the workplace or university? Results show that 70 percent of respondents answered that harassment affects their attendance in university or workplace, while 30 percent reported that harassment does not affect their attendance. The respondents say that harassment is the leading cause of their low self-esteem. 68 percent were reported that harassment is the leading cause of their low self-esteem, while 32 percent of respondents stated that only harassment is not the leading cause of their low self-esteem.

To analyse respondents' mental health when they asked about the harassment that university/public transport mentally stress them? Out of 50 respondents, 92 percent reported that harassment mentally stressed them, and 8 percent reported they were unsure. They also noted that harassment cause emotional instability in females. Results show that 58 percent of respondents said that harassment affects their relationships with their colleagues and class fellows. The rest of the respondents or 42 percent reported that harassment did not affect their relationships with their colleagues and class fellows, as well as they, reported that the harasser intended to threaten the woman and also mentally hurt her. A total of 50 respondents reported that bus drivers, strangers, and co-male passengers in university buses made rude remarks and said negative things behind them.

To analyse the experience of harassment, 83 percent of respondents reported that because of experienced harassment, people treat them differently. 17 percent of respondents say they were never treated differently. The respondents were asked if they ever felt shy talking about harassment at home. Results show that 28 percent of respondents reported feeling nervous, and 72 percent said they never feel shy talking about harassment at home. Results show that most women do not complain to higher authorities because of their self-respect, so they face harassment daily. Result also shows that 50 out of 50 respondents report that the university needs to be aware of females harassment. They also noted that the university needs to arrange proper seminars and ordinations on harassment and teach them self-defence techniques to prevent harassment. They also stated that the females need more support and should act against the harassment.

## Conclusion

Harassment in public and university transport is an ongoing, persistent issue. However, harassment in transport is highly prevalent, particularly in developing countries like Pakistan. This study attempts to provide some insight by analysing transportation survey data from women's point of view in AWKUM. In Mardan young women were more likely to experience harassment than older women. Harassment is a significant issue in our society faced by women. Most women far away from their community's face harassment in public transport.

In this study, women develop emotional consequences that can mentally harm them. Because of harassment, most women face psychological issues (depression, stress, etc.). Harassment can also affect their traveling patterns. To avoid harassment, they either travel by other vehicles or walk to their homes. If their homes are far away from the workplace or educational institutions, they can face these problems, which affect their performance and mentally stress them.

To minimize the issue of harassment and for safe traveling, the government of Japan and Pakistan, and with the help of UN Women and UNOPS, start a project to improve transportation available for women in Khyber Pakhtunkhwa province. The project was started on 14<sup>th</sup> April, 2019. Under the scheme, they started 14 pink buses for women passengers that run through proper routes in Mardan city, the most populated area in Khyber Pakhtunkhwa province. The buses provide a safe mode of transport for women having female conductors and the exact cost of a private vehicle such as rickshaws and minivans. This project gives women peace of mind, which hardly continued its services for a few months, and failed to provide a safe mode of transport.

Furthermore, no other safe mode of transport is available for females. Unfortunately, harassment in public transport and university transport is still a problem. Maybe it is the consequence of a system error in which the need for women is often ignored.

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## Discourse Strategies in Chief Olusegun Obasanjo's Letter to President Goodluck Ebele Jonathan

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### Abstract

The paper sets out to investigate the discourse strategies deployed by former President Olusegun Obasanjo in his open letter to President Jonathan on December 12, 2013 which was published in most of the nation's major newspapers. The work adopts M.A.K Halliday's Systemic Functional Grammar as its theoretical framework because of the great importance which the model attaches to meanings and functions of a linguistic expression in relation to its context of usage. The researchers, through content and qualitative analysis, identify the discourse strategies used by the encoder of the speech to have the desired maximum effects on the decoders, especially President Goodluck Jonathan. Our findings reveal that President Obasanjo makes use of six discourse strategies in the letter for achieving some aims. The discourse strategies are: references to national interest; using the vocative "Mr President"; mentioning and portraying God in different perspectives; making direct appeals to the president; making references to late Gen. Sanni Abacha and copious repetitions of Nigeria and Nigerians in the text.

**Keywords:** Discourse Strategies, Open Letter, National Interest, Goodluck Ebele Jonathan, Olusegun Obasanjo

## **1. Introduction**

Political leaders and politicians generally need to communicate their thoughts, feelings, intentions, and opinions to their associates, followers, opponents, and contemporaries in the entire political area(s) over which they superintend (local government, state or the entire country). The most acceptable medium to achieve this is through language. This agrees with the position of Emeka-Nwobia (2016:13) that language is “the central focus of human existence and the paradigm of expression of intent, thought and actions”.

Depending on several factors, political leaders and politicians may make use of either the spoken or the written medium to pass on their messages. Depending again on several considerations, especially what such politicians or political leaders hope to achieve, the nature and composition of the audience, the nature of the message, the urgency of feedback etc, several channels are open for politicians to pass on their intentions, feelings, and thoughts. Fairclough (2003) writes that the ability to determine the most appropriate channel is very germane to the effectiveness of communication. He further asserts that the channels encompass both oral and written modes. He also observes that while written communication does not have the merit of immediate feedback and interaction, it can be the most appropriate and effective means of conveying a large amount of information.

It must have been because of the advantage of written communication as identified above that made former President Obasanjo on December 12, 2013 to choose the written medium, precisely the form of an open letter to make known his opinions, thoughts, feelings, and observations about Dr Ebele Jonathan and his administration. Commenting on the volume of the letter, Ekhareafu and Ambrose(2015:294) write that “ The letter is pagged 18 which is a copious one for a busy person like a president of a nation to read.”

The letter falls within the purview of political discourse. By political discourse, we mean discourse “about the text and talk of professional politicians or political institutions such as Presidents, Prime Ministers and other members of government, parliament or political parties, both on the national and international levels” (Van Dijk, 1997:12). However, the scholar (van Dijk 1997: 12) adds that the text must have political functions and implicatures. The text under study is a political discourse because it is a letter written to the then President of Nigeria (Dr Goodluck Jonathan) by Chief Olusegun Obasanjo who himself was a two-term president of the Federal Republic of Nigeria (1999-2007).

### **1.1. Highlights of the Letter**

The letter was written on the 12<sup>th</sup> of December, 2013 and published in different national dailies and given different titles. While *The Guardian*

captions it “Obasanjo writes Jonathan”, *Nigerian Tribune* entitles it “Before it is too late” The letter informs Dr. Jonathan (the then president) of the various political, economic, social, and security challenges facing the country. Chief Obasanjo blames him for not measuring up in some areas. He also accuses Dr. Goodluck Jonathan that he is not loyal to the party – Peoples Democratic Party (PDP) which brings him to power but that he promotes the interest of other political parties in different states of the federation over that of PDP in order to further his personal political ambition. In the letter, Obasanjo also openly accuses Dr. Goodluck of not being a man of his words by planning to contest for the post of President in 2015 general elections despite his earlier assurances that he would not contest. Furthermore, he indicates that Dr. Goodluck assists a notorious murderer to evade justice and even sends presidential delegations to welcome him home. Chief Obasanjo equally writes that he is privy to the information that the president is secretly training some snipers and other armed personnel for political purposes. Other sections of the letter accuse the president of the inability to control corruption that stinks all around him, shielding an internationally known drug baron from justice as well as promoting him politically, allowing and tacitly encouraging the people of the Ijaw nation to insult other tribes in the country simply because the president (Dr. Goodluck Jonathan) is from Ijaw, and stepping down infrastructural development in Rivers State for political reasons.

Ordinarily, there is nothing bad or strange for an ex-president to make his observations (positive or negative) about the state of the nation known to the ruling president and the entire citizens. However, different people will look at it from different perspectives and give different interpretations to the action of Chief Olusegun Obasanjo. While some people will interpret the content of the letter as issue-based, others will see it as a personal attack on the president and an attempt to ruin him politically. The encoder of the letter himself must have thought of how his intention of writing the letter would be interpreted (rightly or wrongly), hence, the use of some strategies to achieve specific goals in the letter.

## **1.2. Theoretical Framework**

The theoretical framework adopted for this work is Systemic Functional Grammar (SFG) pioneered by M.A.K. Halliday. SFG places emphasis on the relationship between language and the social situations of its use. In the words of Fairclough (2003:7), “systemic functional linguistics is concerned with the relationship between language and other elements and aspects of social life and its approach to the linguistic analysis of texts is always oriented to the social character of texts”. SFG is a grammar that places emphasis on meaning, function and language use”. (Ojo, 2018:1). This simply means that the grammar is not solely concerned about formal analysis of

sentences or phrases but also with their functions in context. This view supports the position of Martin and Mathiensen (1997:3) quoted in Omotunde and Akinwotu (2018:97) that the grammar makes it possible to have more knowledge about language in context and that it provides us with “a tool for understanding only a text the way it is”. SFG is noted for its metafunctions which are ideational, interpersonal, and textual. It is the interpersonal function that is relevant to this work. In the words of Halliday (1978):

The interpersonal component represents the speakers’ meaning potential as an intruder. It is the participating function of language, language as doing something. This is the component through which the speaker intrudes himself into the context of situation, both expressing his own attitude and judgments and seeking to influence the attitudes and behaviours of others ( p.112).

The above simply means that it is through the interpersonal component of language that speakers or writers pass on various meanings and messages to their listeners or readers. Also, through interpersonal meaning, speakers and writers exhibit their attitudes towards the subject or object of discourse.

Another important thing about Systemic Functional Grammar (SFG) is the notion of “choice” which is very central to the realisation of meaning in discourse. On the issue of choice, Ademilokun (2016) declares that:

SFL echoes the view that language users make choices out of the options available to them anytime they use language and the options are determined by the conditions of language use. The theory has a deep view of context as it accounts for how the context of language use shapes the language that is used(p .31).

The above reveals that the issue of choice is essential to the realisation of the exact message and meaning which speakers and writers have in mind. This is why Fontaine (2013:11) writes that “there is general agreement that meaning is choice and choice is meaning”. This theory is appropriate to this work because, first, the interpersonal function of the grammar will make it possible to reveal the various meanings and functions of the discourse strategies used by Chief Olusegun Obasanjo in his letter to President Goodluck. Also, the researchers believe that some expressions/words used by Chief Olusegun Obasanjo when writing the letter are deliberate choices in order to realise certain interpersonal meanings.

## **2. Literature Review**

The type of political discourse under investigation is not as common as other genres like campaign speeches, inaugural speeches, acceptance speeches, and Independence Day speeches by Presidents and Governors.

However, the few available ones, specifically on the letter in question, are reviewed below.

Omojuyigbe's (2015) work centres on discourse markers in Chief Olusegun Obasanjo's letter to President Goodluck Jonathan. The author reveals that discourse markers were engaged to make readers believe that President Jonathan was guilty of all the allegations leveled against him in the letter. However, the analysis mainly dwells on the discourse markers such as: or, nor, however, now, so to say, but, for now, and others which have clear meanings in their context of use. This approach is far from the current linguistic investigation.

Ekhareato and Ambrose (2015) investigate the letter in question from the angle of critical discourse analysis. Though the work adopts critical discourse analysis as its theoretical framework, it only centres on the few situations where metaphorical extensions, linguistic irony, pun, and face threatening acts are used in the letter as well as where there are demonstrations of power and superiority in the speech. In other words, the paper has a different focus from our work. Anaedozie (2015) makes use of insight from the metaphor of cancer to analyse not only Obasanjo's letter but also Jonathan's reply to the letter. It is important to note that the work is only a commentary on the issues of corruption raised in the two letters and they are not discussed from the angle of linguistic analysis. In addition, Aworo-Okoro and Mohammed's (2016) work is a speech Act Analysis of the letter from Lawal's theory of speech acts and Levinson's Negotiation theory. However, the findings from the work cannot be generalised in that it only makes use of eleven sample sentences from each of the two letters used for the study. Apart from the above, the work under review is not the same in focus with the current research. Lastly, Oguche and Ibrahim (2018) examine the letter from the angle of political science by adopting democratic-participant theory meaning that the work adopts a totally different approach towards studying the letter under investigation. The above are the few scholarly works which the authors of this paper could get and it is clear that none of them is centred on the discourse strategies used by Chief Olusegun Obasanjo for the purpose of achieving some goals in the letter. The current research endeavour fills the gap.

### **3. Source of Data and Method of Data Analysis**

The data for this study were obtained from *The Guardian* newspaper of December 12, 2013, although other major national dailies in Nigeria published the letter since it was a major news item. After carefully reading the letter, the researchers identify some major discourse strategies adopted by the writer of the letter after which excerpts are taken from it to back them up. The significance of each particular discourse strategy identified is also fully explained. References are made outside the text to clarify some points where

such will aid comprehension of the point being made. The authors use a qualitative approach in their analysis of the discourse strategies identified in the text under study.

#### 4. Data Analysis / Result

This section discusses the discourse strategies adopted by Chief Obasanjo in our data.

##### i. Mentioning “National Interest”

This is one of the most significant strategies used by Obasanjo in the letter. He mentions “national interest” fifteen (15) times for achieving different pragmatic intentions. This is a way of endearing himself to the minds of his readers not only in Nigeria but other people in other parts of the world. It is a way of indicating that whatever he writes about President Jonathan and about his administration is not borne out of any selfish or ulterior motives. Mentioning “national interest” repeatedly is also a way of saying that national interest supersedes any other interest. In fact, it is a way of silencing all would-be critics of the letter. Below are a few examples of where “national interest” is used in the letter.

- a. *I am constrained to make this an open letter to you for a number of reasons. One, the current situation and consequent possible outcome dictate that I should before the door closes on reason and promotion of **national interest**, alert you to the danger that may be lurking in the corner. (emphasis ours).*
- b. *Mr. President, you have on a number of occasions acknowledged the role God enabled me to play in your ascension to power... You put me third after God and your parents among those that have impacted most on your life.... For me, I believe that politically, it was in the **best interest of Nigeria** that you, a Nigerian from a minority group in the south, could rise to the highest pinnacle of political leadership. If Obasanjo could get there, Yar’adua could get there and Jonathan can get there, any Nigerian can. It is now not a matter of the turn of any section or geographical area but the **best interest of Nigeria and all Nigerians**.*
- c. *I have had opportunity in recent times to interact closely with you, and I have come to the conclusion painfully or happily that if you can shun yourself to a great extent of personal and political interest and dwell more on **the national interest** and also draw the line between advice from selfish and self-centred aides and advice from those who in **the interest of the nation** may not tell you what you will want to hear, it will be well.*

- d. *This is being oblivious of the sacrifices others have made in the past for the unity, stability and democracy in Nigeria in giving up their lives, shedding their blood and in going to prison. I personally have done two out of the three sacrifices and I am ready to do the third if it will serve **the best interest of the Nigerian dream.***
- e. *But I will not support what I believe is not in **the best interest of Nigeria** no matter who is putting it forward.*

A closer look at the above excerpts will reveal that Obasanjo uses the phrase “national interest” or its equivalent for many things.

In excerpt “a”, national interest or its equivalent is used to justify his current letter to Jonathan. The phrase “national interest” is used in the second sentence of the 18-page letter. Here, it is strategically used to give the impression at the outset of the letter that the purpose is mainly the promotion of national interest. In excerpt “b”, he uses it to justify his staunch support for Jonathan to become the president of Nigeria in 2011. In excerpt “c”, pragmatically, the phrase “national interest” or “in the best interest of the nation” is used to advise Jonathan to allow national interest to guide his actions as the president of Nigeria then. In excerpt “d”, in a rare show of commitment to one’s country, Obasanjo reveals the extent he can go because of national interest – that he can die for Nigeria. To explain further the excerpt under consideration (“d”), Obasanjo fought during the Nigerian Civil War (where he shed his blood); he was imprisoned by Abacha on a trumped-up charge of planning to overthrow the government of Abacha, and here in this letter, he writes that “I am ready to do the third if it will serve the best interest of Nigerian dream”. In essence, Obasanjo is saying here that he can die for Nigeria if it is going to serve the interest of Nigeria. In excerpt “e”, Obasanjo reveals what he will not do in the national interest. The above has shown that Obasanjo’s use of “national interest” or “in the best interest of Nigeria” is a discourse strategy used to pass across different messages.

## **ii. Using the vocative “Mr. President”**

The vocative “Mr. President” is used fourteen (14) times in the letter by Obasanjo. Even though Obasanjo surpasses Jonathan in age, political experience (both nationally and internationally), personal recognition (both nationally and internationally), he still gives Jonathan the recognition and respect due to his office as the President of Nigeria then. The continuous mentioning of “Mr. President” is a way of acknowledging Jonathan as the overall head of the country and that he (Obasanjo) is not out to disrespect that office or undermine his authority. The second reason for repeating “Mr. President” is to pragmatically inform Jonathan that he should take note of some points. In essence, he uses “Mr. President” anytime he (Obasanjo)

wishes to advise or plead with him. In other words, Obasanjo uses Mr. President as an attention-getting device.

- a. Mr. President, let me plead with you for a few things that will stand you in good stead for the rest of your life. Don't always consider critics on national issues as enemies.
- b. Mr. President, be very wary of assistants, aides and collaborators who look for enemies for you. I have seen them with you and some were around me when I was in your position.
- c. Mr. President, let me again plead with you to be decisive on the oil and gas sector so that Nigeria may not lag behind.
- d. Mr. President, let me hope that as you claimed that you have not told anybody that you are contesting and that what we see and hear is a rumbling of overzealous aides, you will remain a leader that can be trusted.
- e. My last piece of advice, Mr. President is that you should learn the lesson of history and please, do not take Nigeria and Nigerians for granted.

In all the above excerpts, Obasanjo uses the vocative "Mr. President" to ensure that he (Jonathan) listens to and digests his (Obasanjo) advice, entreaties and pleadings.

### iii. **Mentioning and portraying God in different perspectives**

This is a very unusual political discourse in that Obasanjo mentions God seventeen (17) times. He portrays God in different perspectives. The majority of Nigerians erroneously believe that political leaders who make references to God often must be a "God-fearing" person, hence, reliable, trustworthy, and responsible with the overall conclusion that such leaders are qualified to be supported. In short, mentioning God several times in the letter is meant to convince his Nigerian readers that he is a real Christian who "knows" God and His various attributes and power with the overall aim of convincing his readers that what he has written in the letter is nothing short of the truth and that all his conducts are divinely guided. The excerpts below convey some of the different perspectives in which Obasanjo portrays God in order to project the image of somebody who is close to God.

- a. Mr. President, you have on a number of occasions acknowledged the role **God** enabled me to play in your ascension to power. I have always retorted that **God** only put you where you are and those that could be regarded as having played a role were only instruments of **God** to achieve **God's** purpose in your life. (Emphasis ours).

Obasanjo is saying above that it is only God that “enthrones” or “crowns” somebody, hence, Jonathan’s presidency is an act of God and that he (Obasanjo) is only an instrument in the hands of God through which Jonathan became the president.

What Obasanjo is saying here in the religious parlance is that “he returns all glory to God” which is meant to thrill the adherents of the three major religions in Nigeria.

- b. We must all remember that corruption, inequity and injustice breed poverty, unemployment, conflict, violence, and wittingly and unwittingly create terrorists because the opulence of the governor can only lead to the leanness of the governed. But **God** never sleeps. He is watching, and bidding His time to dispense justice.

The perspective of God which Obasanjo shows above is that God is the judge of exploiters, oppressors, and corrupt people.

- c. May **God** grant you the grace for at least one effective corrective action against high corruption which seems to stink all around you in your government.

The only reason Obasanjo could bring God into the above scenario is to portray himself to Nigerians as a leader who relies on God for everything. Otherwise, it is self-discipline, national interest and legal steps that Jonathan needed that time to take an “effective corrective action against high corruption” that surrounded him at that time.

- d. **God** is never a supporter of evil and will surely save PDP and Nigeria from the hands of destroyers.

Mentioning God as the solution to PDP and Nigeria’s problem is self-serving. These are mundane problems that require mundane approaches to finding solutions to. In essence, Obasanjo only wishes to give the impression that he is a person who believes in God in tackling or resolving every problem pertaining to Nigeria.

#### **iv. Direct Appeals to the President**

There are more than ten (10) appeals in the letter. These appeals normally come at the end of any serious issues or observations raised by Obasanjo. The main purpose of the appeals is to show that he (Obasanjo) is not merely interested in pointing out the problems or issues at hand in order to castigate or ridicule the president or to show that he is not capable, but rather to indicate that he is really concerned with how to solve the problems in the interest of the nation. One of the ways of showing this concern is through

appeals. The appeals in the letter are in the form of pleading, advising, and appealing. Few examples are given below.

- a. I wish to see no more bloodshed occasioned by politics in Nigeria. Please, Mr. President, be mindful of that. You were exemplary in words when during the campaign and the 2011 elections, you said “my election is not worth spilling the blood of any Nigerian.” From you, it should not be if it has to be... let peace, security, harmony, good governance development and progress be for Nigeria... **you can do it and I appeal that you do it.** (emphasis ours).

The expression in bold letter above is an appeal to Jonathan not to allow political violence to engulf Nigeria, but instead do all he can to promote peace, security, harmony, good governance, development, and progress for Nigeria.

- b. Nigeria, which is the Saudi of Africa in oil and gas terms, is being overtaken by Angola only because necessary decisions are not made timely and appropriately. **Mr. President, let me again plead with you to be decisive on the oil and gas sector so that Nigeria may not lag behind.** (Emphasis ours).

The appeal above is made to President Jonathan to take an economic decision that will benefit Nigeria. The appeal shows again that Obasanjo is economically concerned about Nigeria.

- c. Mr. President, **let me plead with you for a few things that will stand you in good stead for the rest of your life.** Don't always consider critics on national issues as enemies. Some of them may be as patriotic and nationalistic as you and I who had been in government. Some of them have passion for Nigeria as we have. (Emphasis ours).

Obasanjo uses the appeal above to show his concern for how Jonathan may wrongly judge and assess some people who have come to genuinely advise him (Jonathan).

- d. I know you have the power to save PDP and the country. **I beg you to have the courage and the will with patriotism to use the power for the good of the people.** (Emphasis ours).

The appeal above is to indicate his concern and his love for the generality of Nigerians, hence, his appeal to Jonathan to use his power for the good of the people.

**v. Direct References to Abacha**

Abacha's name is mentioned five (5) times in the letter. Abacha was a military ruler who ruled Nigeria with a heavy hand from 1993 to 1998. He was the greatest dictator known in modern Nigeria. At a later time of his inglorious regime when he wanted to transmute into a civilian president, he became very ruthless and impatient towards any dissenting opinions. Many notable Nigerians were killed and many others had to flee the country to save their lives. The encoder of this letter (Obasanjo) and many other notable Nigerians were hauled into prison on trumped-up charges. In fact, no living, sane, and mature Nigerian at that time would ever forget Abacha's regime and Abacha's name. Financially, Abacha looted the country to the point of comatose. Below are some of the excerpts in which Abacha's name is mentioned.

- a. I could sense a semblance between the situation that we are gradually getting into and the situation we fell into as a nation during the Abacha era.
- b. The harassment of my relations and friends and innuendo that are coming from Government Security apparatus on whether they belong to new PDP or supporters of defected Governors and which are possibly authorised or are the works of overzealous aides and those reading your lips to act in your interest will be counterproductive. It is an abuse of the security apparatus. Such abuse took place last in the time of Abacha.
- c. Allegation of keeping over 1000 people on political watch list rather than criminal or security watch list and training snipers and other armed personnel secretly and clandestinely acquiring weapons to match for political purposes like Abacha and training them where Abacha trained his own killers, if it is true, it cannot augur well for the initiator, the government and the people of Nigeria.

All the excerpts above show some negative things that Abacha did when he was ruling. So, making references to Abacha is a discourse strategy meant to achieve two things:

- a. To make Nigerians start scrutinising, monitoring and checking president Jonathan's actions very well in order to prevent misuse of power and dictatorial tendencies.
- b. To make Jonathan himself have a re-think and a review of some of his actions that may make Nigerians to associate his name with Abacha and to prevent history from judging him harshly.

**vi. Repetitions of Nigeria/Nigerians**

In the text, Nigeria and Nigerians are mentioned 92 times. These could have been replaced or substituted with "nation/country" and "citizens of the

country” respectively. Mentioning Nigeria and Nigerians is a discourse strategy meant to show his love and patriotism for the country. These repetitions indicate that the overall concern of the encoder of the letter is Nigeria and Nigerians. Below are examples where Nigeria and Nigerians are strategically mentioned in the text.

- a. I want nothing from you personally except that you run the affairs of **Nigeria** not only to make **Nigeria** good, but to make **Nigeria** great for which I have always pleaded with you and I will always do so. And it is yet to be done for most **Nigerians** to see. (emphasis ours).
- b. My last piece of advice, Mr. President, is that you should learn the lesson of history and do not take **Nigeria** and **Nigerians** for granted. Move away from the culture of denials, cover-ups and proxies and deal honestly, sincerely and transparently with **Nigerians** to regain their trust and confidence. **Nigerians** are no fools...

In the above excerpts, “Nigeria” and “Nigerians” are strategically mentioned to show that Obasanjo’s main concerns are Nigeria and Nigerians, hence, a way of informing Nigerians that he wrote this letter in the interest of Nigerians apart from the overall national interest already mentioned.

## 5. Discussion

The paper aims at determining the reasons behind Obasanjo’s choice and use of certain words and expressions in the letter under study. These different choices have been referred to as discourse strategies adopted for the purpose of releasing certain intentions. In the text under study, Obasanjo uses the phrase “national interest” fifteen times. It has been revealed by Deighton (2017) that “when politicians use the phrase “national interest”, they seek to convey a message about the importance of what they are saying”. By mentioning national interest with respect to different situations and events as evident in our analysis, Obasanjo probably wishes to achieve three things. The first one is to accuse Jonathan of not taking national interest into consideration in his mode and style of governance. The second one is to glorify himself or show that he is a patriotic Nigeria whose actions and policies have been and will be guided by national interest. Third, Obasanjo wishes to charge Nigerians to allow national interest to guide all their actions.

Another discourse strategy used in the letter is the use of the vocative “Mr. President” fifteen times for two main reasons. First, it is a strategy to make the president be fully aware that the message or the content of the letter is addressed to him in person and not to the invisible or abstract entity called the “presidency”. Second, it is to give the impression that he (Obasanjo) still has maximum respect for Jonathan as the President of the Federal Republic of Nigeria, hence, Obasanjo’s repeated use of the exalted title. The third strategy

identified in the letter is mentioning God several times. Different scholars have interpreted the use of “God” in political texts by politicians differently. For example, Emeka-Nwobia (2016:18) in her work on other Obasanjo’s political texts where he mentions God copiously writes that mentioning God “is a major rhetorical strategy utilised by politicians to manipulate their audience”. However, Ekhareato and Ambrose (2015) when commenting on the mentioning of God by Obasanjo in the letter under consideration write that Obasanjo’s obvious show of piety by mentioning God in the letter is a clear show of power which is implied in the sentences they appear. The authors of this paper disagree with the view of Ekhareato and Ambrose (2015) and align with the position of Emeka-Nwobia that mentioning God by politicians is for manipulative purposes. Emeka-Nwobia (2016:17) says that “manipulation is realised when the listener cannot see the speaker’s covered intentions behind what is actually said”. The various intentions or manipulative tendencies of Obasanjo in mentioning God copiously in the letter have been discussed under some of the excerpts given in which Obasanjo mentions God. However, the one that catches our attention most is where Obasanjo writes that God is biding His time to dispense justice against corrupt people in power. This is very surprising in that Obasanjo was a former president who knows that there is machinery of the state put in place to deal with corrupt people and fight against injustice. In fact, his administration established The Economic and Financial Crimes Commission (EFCC) and Independent Corrupt Practices Commission (ICPC) to combat corruption and other related offences. In essence, Obasanjo only writes the above in order to warm himself into the hearts of the masses who take solace in the conviction that it is God who will fight for them against the oppressors, exploiters, and the corrupt ones in power. Obasanjo knows that the prayer of an average Nigerian in church or mosque is that God should punish and judge all exploiters and corrupt individuals in government who have made life unbearable to the masses.

Obasanjo also uses the strategy of direct appeals to the president. The appeals take the form of pleading, advising, and begging. The aim of this is to soften Jonathan’s heart and make it appear as if he (Obasanjo) is only after the success of Jonathan and his administration as well as the progress of Nigeria in all the areas in which he (Obasanjo) has appealed to Jonathan. Making direct references to Late General Sanni Abacha is also a strategy to warn Jonathan to be careful of how history will judge him after leaving the office; it is also a strategy to warn Nigerians to be watchful of Jonathan’s actions before they become something else. Lastly, mentioning Nigeria/Nigerians 92 times in the letter is simply for emotional reasons. Obasanjo uses this strategy to give the impression and the conviction that he dearly loves Nigeria and Nigerians and that the interest of Nigeria and Nigerians is his principal focus in the letter.

## Conclusion

Rozina and Karapetjana (2009:114) write that “it is axiomatic that language plays an essential part in politics because its main function in different political situations is to enable politicians to form structurally stable social relationships”. This, probably, may mean that all the discourse strategies adopted by Obasanjo in the letter using the medium of language are to achieve “stable social relationships” with Jonathan on the one hand and the entire Nigerians on the other. For example, making references to “national interest”, “God”, “Abacha”, “Nigeria and Nigerians” copiously in the letter may be to achieve stable social relationships with the majority of Nigerians. On the other hand, the strategy of repeating the enviable title “Mr. President” and the use of appeal discourse strategy may be to achieve “stable social relationship” with Jonathan despite the fact that the letter criticises some aspects of Jonathan’s leadership style and administration.

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## Council of Europe Mission. Conflict Impact with Russia

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### Abstract

Over the years, international organizations have played critical roles in the interactions and relationships that develop within the international system between and among states. The Russian Federation joined the Council of Europe in 1996 to strengthen its democratic policies. The nature of Russia’s membership in the Council of Europe is somewhat paradoxical, given how far it strayed from the organization’s objectives and principles. This also includes the organization’s credibility and ability to promote democratic values throughout the Russian Federation by applying the European Convention on Human Rights. In light of the latest developments in the conflict with Russia, the issue of the protection of human rights and fundamental freedoms, on which the Council of Europe is mainly focused, seems to be a key point in the European debate and beyond. This paper summarized all points where the Council of Europe deviated from its principles and objectives. The Council of Europe, among others, has to strengthen its authority and become more resilient to afford future crises. The main question of this paper is directly related to the research strategy which is the first element. The general question of this paper is as follows: Can the mission and purpose of the Council of Europe be considered fulfilled in any case of the existence of this organization?

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**Keywords:** Council of Europe, Russia, European Convention of Human Rights, Statute of the Council of Europe

## **Introduction**

The Council of Europe was created after the Second World War as the most important organization which aimed to prevent the conflicts experienced by strengthening the rule of law (European Youth Center Budapest, 2017). This paper focuses on analyzing the mission of the Council of Europe and its role in the international arena. This mission has been in the interest of many scholars over the years and the actuality of its conflict with Russia. The relationship between the Russian Federation and the Council of Europe remains unclear since Russia returned to the Council in 2019 after a 4-year departure from the organization. The attitude of the Council of Europe towards the Russian reactions questions the credibility of the organization in the international arena. The biggest dilemma pertains to the interpretation of the facts.

Russia's membership in the Council of Europe is viewed with suspicion because of the situation Russia was in at the time of accession. However, it was a very important step towards democracy. This is because, for years, Russia had absolutely refused to submit to any form of international judgment. Despite this indisputable progress, serious questions remain regarding the democratic development of the Russian Federation and the principle of democratization based on the gap between European standards and the reality of Russia (Jean-Pierre Massias, 2007, p.12).

### **1. Research Methodology**

The methodology represents the procedure of data collection, which is used to analyze the data. It refers to the logic that pervades research as a whole with the tools, techniques, and procedures by which the empirical material is analyzed to obtain the results of the scientific research. The following methods have been applied in this scientific paper:

Evolutionary method of legal research which deals with tracing the origin and development of the CoE.

Evolutionary-evaluative method of research which aims to determine the nature and the source of the Russia-CoE relationship so as to establish how everything evolved between them.

Influential method which focuses on studying and understanding the effects that come from laws, institutions or the identification of non-legal factors that affect the legal fact, especially the revolts of the Russian delegates who undoubtedly enjoy interaction with legal facts.

Interpretive methods which analyzes the Russian conflict with the Council of Europe. This approach interprets meaning within a specific context and has a purely complementary function.

The analysis in this paper is based on the inductive research method. Here, the main problem of inductive logic is to determine the truth or falsity of a fact by following the probability of conclusions (Stock, 2009).

## **2. Council of Europe, Mission and Objectives**

The Council of Europe, after the overthrow of communism, became the most suitable international institution to help build the democratic institutions of Europe. Many former communist countries became members of the Council of Europe in full compliance with the standards set by it (Council of Europe Strasbourg, 1998, p.11-1). Founded by the Treaty of London of 1949, it is the promoter of important European conventions, of which the European Convention for the Protection of Human Rights and Fundamental Freedoms of 1950 plays a special role. The CoE is an organization that deals with a wide range of human rights, as well as with democracy and the rule of law. Through the ECHR and the binding jurisdiction of the European Court of Human Rights, it is the most developed regional human rights regime in the world.

Any European country that recognizes the principles of the rule of law and guarantees the human rights and fundamental freedoms of individuals under its jurisdiction can become a member of the Council of Europe. Its main principles are based on trust, justice, and cooperation between states. The member states becoming part of the Council of Europe agree to become part of a community which is supposedly and practically created on the basis of common principles and values of the states. The powers of the Council of Europe are quite broad and vary according to its bodies. The mission of the Council of Europe goes beyond its competencies, due to the impact it has continuously brought to the societies of different countries. It has launched campaigns on sensitive and important issues, such as child protection, hate speech online, Roma rights, equality and protection of minorities, etc. The Council of Europe helps member states fight corruption and terrorism and undertake the necessary judicial reforms to advance justice. Its group of constitutional experts, known as the Venice Commission, provides legal advice to countries around the world on various legal issues. This assistance are in the form of opinions prepared by the Venice Commission at the request not only of the states but also of the bodies of the Council of Europe (United Nations Special Rapporteur on the Independence of Judges and Lawyer, 2019).

## **3. The Activity of the Council of Europe in Russia**

The Russian Federation became the 39th member state of the Council of Europe on 28 February 1996, following a long road to success in defending human rights thanks to the intervention of the Council of Europe. The

intervention activity in the Russian Federation has been quite extensive and efficient. During the last transition period of 1990-2000, Russia was forced to include in its national legislation dozens of Council of Europe statutes and conventions that go beyond the law of the ECHR. These charters and conventions claimed to strengthen the protection of national minorities in Russia, strengthen local self-government, and increase anti-corruption measures and other ambitious goals in the service of the rule of law and the protection of fundamental human rights and freedoms. Political pressure from the CoE has always been a source of conflict in CoE-Russia relations, which was later interpreted as interference in domestic politics. The 1995 Framework Convention for the Protection of National Minorities, ratified in 1998 in the Russian Federation, provides a monitoring system to assess how the treaty is implemented in the member states (Council of Europe, 1998). An advisory committee adopts recommendations to improve minority protection. Russia ensures the protection of the rights of Russian citizens, including national minorities, facilitates their ethnocultural development and protects linguistic identity, unimpeded access to education, participation in public associations, the use of the mass media, and the exercise of the right to vote. The Council of Europe has provided significant assistance to the Russian Federation in the area of improving Russian legislation to prevent, respond to, and suppress interethnic intolerance or hatred (Council of Europe, 2016).

The Council of Europe uses independent monitoring mechanisms, which assess its adherence to human rights and democratic practices. A concrete form of this monitoring is carried out by the Council of Europe Committee for the Prevention of Torture. Based on its mission according to the program by the Parliamentary Assembly, it conducts previously unannounced visits to the member states of the Council of Europe. These visits take place regularly in detention centers, prisons, police stations, centers for the protection of foreign nationals, etc., in order to assess how people who are deprived of their liberty are being treated. All this helps the Council of Europe to take action if it finds violations in accordance with the European Convention on Human Rights, and it also help these individuals who may be mistreated in these democracies of KiE. The Russian Federation has always expressed its readiness to cooperate in this regard and to allow the Council of Europe Committee for the Prevention of Torture to act within its mission, thus publishing informative reports on the obstacles to an effective investigation up to pursuing cases of torture to ensure the punishment of executors (Tarseeva, 2015). All this is not only an aid to the Russian Federation but also to other CoE member states. It should be noted that the absolute prohibition of torture under Article 3 means that it is not allowed to be used even in time of war.

#### 4. Russian Issues in the ECHR

**Table 3.1.** European Court of Human Rights, 1959-2020

R U S S I A	Total number of trials from 1959 to 2020	2884
	Trials with at least one violation	2724
	Cases: The right to life - deprivation of life	330
	Cases: The right to a fair trial	935
	Cases: The right to liberty and security	1203

According to statistics published by the European Court of Human Rights, the Russian Federation is the country with the highest number of cases sent for violation of articles of the European Convention on Human Rights to this court (among 47 states that are members of the Council of Europe). Over the years, 2,884 cases have been reviewed, which places Russia as the second country with the most cases tried for violation of ECHR articles. High-profile cases lost by Russia in the Strasbourg Court speak of a necessity that citizens have and a need for "protection" when they cannot find justice in their courts. One of the most common questions that can be asked about this court is: What is the function and role of the European Court of Human Rights in providing individual solutions and changes in Russian domestic legislation? The European Court of Human Rights has always focused on resolving its problems as well as applying sanctions to violating states. It has faced one of the most important and equally difficult challenges that can be presented to this court, namely the issue of the conflict between Ukraine and Russia (Risini, 2018, p. 2).

The Council of Europe acknowledged that Russia lacked much of the legal protection mechanisms required for the fundamental protection of human rights; however, Russia was accepted as a member based on the optimistic proposition that *“integration is better than isolation”*; *“cooperation is better than confrontation”* (Futamura & Bernaz, 2014, p. 4). Nonetheless, it seems that this optimistic proposal did not work out due to the relationship between the European Court of Human Rights and the Russian National Court. Under the 1993 Russian Constitution, international treaties became part of the Russian legal system. Consequently, international law would take precedence over national legislation and the Strasbourg judgments in this case were binding. However, this changed over time.

Death penalty policies are not simply shaped by human rights considerations, but are also influenced by the political, social, and cultural factors that are taken into account. This sentence is undoubtedly the most severe sentence that can be executed against an individual, as well as it undoubtedly constitutes a violation of the right to life. Despite differing views, it expresses the application of ‘lex talionis, otherwise known as the law of revenge. It is prohibited by law in all democratic countries because it cannot

be justified despite the serious damage that the criminal offense may have caused. Upon joining the Council of Europe, Russia imposed a moratorium on the death penalty. Thus, one of the absolute requirements of the Council of Europe for all its members is that the death penalty should not be carried out for any criminal offense. Since the moratorium on executions was imposed in August 1996, no further death sentences have been carried out in Russia.

## **5. The Origin of the Conflict and International Sanctions**

The identification of Russians with Ukraine has strong historical, cultural, religious, and economic roots. The Russians regard Kiev as the historical nucleus of the Russian state (Cohen, 2016, p. 234). In 2013, the President of Ukraine, Viktor Yanukovich, decided against the signing of an Association Agreement with the European Union at the Eastern Partnership summit in Vilnius on November 29, sparking large-scale protests in Ukraine (Eurasia Daily Monitor Volume: 10 Issue: 215, 2013). Protests against the government began as peaceful demonstrations in November 2013, but it turned into bloody violence in February 2014. Yanukovich received large financial aid from Russia, which was his firm support. The conflict turned into a long-running rebellion that threatened to divide the country and remained hostage to the Russia-West domination war (Cohen, 2016, p. 234). The conflict erupted with mass protests where, in February 2014, Viktor Yanukovich finally left Kiev after the Ukrainian Parliament voted to acquit him. Russia in 2014 responded by illegally occupying the Crimean peninsula by annexing it (Kuzio, 1997, p. 36-56). The EU, the United States, and other countries imposed sanctions on Russia.

In its 2016 annual report, the Council of Europe did not mention human rights abuses in Crimea because Russia had not allowed its monitors to enter, pointing once again to violations that are unjustified (Melkezerova, 2016). The Council of Europe has always expressed its position on the issue of the Russian conflict over the annexation of Crimea. The Council of Europe has given its full support to the territorial integrity and national unity of Ukraine and strongly condemns the violation by the Russian Federation of the sovereignty and territorial integrity of the country.

There were numerous reactions to the situation in Russia and the annexation of Crimea, where in most cases they were accompanied by sanctions. The sanctions were of such a form as to prevent Russian and Crimean officials and politicians from traveling to different countries, but it was not only that. Sanctions were imposed by the United States, the European Union, and many other countries (Overland & Fjaertoft, 2015). Reactions through sanctions took the form of vice-versa, as Russia responded similarly with sanctions against a large number of important countries, including a complete ban on food imports from the European Union, the United States,

Norway, Canada, and Australia for a period of one year (The New York Times, 2014). The main sanction imposed by the EU against the Russian Federation consisted of “Prohibition of entry into the territory of European Union countries, or transit, of persons responsible for actions that threaten the territory, integrity, sovereignty and independence of Ukraine” (Council Decision 2014/145 / CFSP). Nowadays, still in 2021, sanction was implemented by the European Union and the United States on the Russian Federation. This comes as a result of the reaction to the violations committed, which leads to conflicts that transcend the nature of the Council of Europe and affect a global report of states, further aggravating the current situation (Council of the European Union, 2020). Representatives of these countries stressed that they would lift the sanctions only on one condition which had to be met by the Russian Federation, “Moscow to implement the Minsk Agreement” (Interfax-Ukraine, 2016).

## **6. Suspension by the Council of Europe**

The Council of Europe would respond to repeated violations by Russia. The CoE Parliamentary Assembly suspended Russia's voting right due to the issue of annexation of Crimea by the end of 2014 (Parliamentary Assembly, 2014). The reasoning given by the Council of Europe was that the role and participation of the Russian Federation in the conflict in Eastern Ukraine, as well as the ongoing illegal annexation of Crimea, was in complete contradiction with the Statute of the Council of Europe (Parliamentary Assembly, Resolution 2034 (2015) Final version). As a result, the Parliamentary Assembly of the Council of Europe strongly condemned Russia's violation of Ukraine's sovereignty and territorial integrity. At the same time, the Assembly stressed the need to continue the dialogue with the Russian Federation, including its obligations and respect for the values and principles of the Council of Europe which cannot be violated.

With the opportunity offered for dialogue, the Assembly thus did not cancel the credentials of the Russian Federation but made a temporary suspension of them until the end of the 2014 session. This includes the voting rights of the Russian delegation, as well as its right to be represented in the Bureau, the Presidential Committee, and the Standing Committee of the Council Assembly, including the right to take part in election observation missions (Parliamentary Assembly, 2014). Based on this, the Parliamentary Assembly of the Council of Europe defended the idea that the Russian and Ukrainian authorities should fully and transparently investigate any reports of human rights violations and war crimes committed by their own citizens (Parliamentary Assembly, Resolution 2034 (2015), Point 9). The Parliamentary Assembly has taken the right position because by violating the sovereignty and territorial integrity of Ukraine, the Russian Federation has

thus created a threat to stability and peace in Europe. In case of non-reaction of organizations or states to the issue of Crimea and the conflict with the CoE of Russia, they would bring great steps towards an international existential danger.

The focus on human rights, rule of law, democracy, and peaceful cooperation between them makes the Council of Europe, as a regional international organization, to be particularly inclined to consider the departure of a member state as the last resort envisaged. Sanctions are imposed in order for the member states of the organization to comply with its normative obligations. In other words, a state may be required to leave it only if there is no other way to encourage or compel it to fulfill its obligations. The fact that the possibility of suspending and removing a state from the organization itself, which is provided for in the Statute, speaks of the legitimacy that the Council of Europe has (Wilfred Jenks, 2009, p. 160). This also makes it impossible for the deported state not to challenge the decision or strike it for illegality. However, the international organization should use this sanction only as the last tool and only after carefully considering all the relevant factors for the departure of the member state. Nonetheless, it is not entirely clear what kind of evidence an international organization must produce to substantiate its decision to suspend or remove a member state. In an organization as the Council of Europe, it is important for its members to share their common values and to be actively and continuously engaged in achieving the goals of the organization and the nature of the organization.

## **7. The Russian Threat to the Council**

To protest the decision taken by the Assembly, the delegates abandoned the latter, leaving before the vote on the resolution was held (The Guardian, 2014). Since then, the Russian delegation has boycotted the plenary sessions of the Parliamentary Assembly, justifying that they will boycott the sessions until Russia is fully and unconditionally restored to its rights (The Guardian, 2014). What further escalated the conflict situation between Russia and the CoE was the fact that in 2017, Russia suspended its payment to the Council of Europe (a payment which is mandatory for every member state of the Council of Europe for the progress of the organization) (Viacheslav Volodin, 2017). This budget consists of the contributions made to the Council of Europe in proportion to the population and economic level of the member states, including the development it undergoes. The contribution of the members of the Council of Europe is used and serves the whole organizational structure of the CoE. States can also contribute by making voluntary contributions to the Council of Europe budget, thus helping and supporting work programs in various fields. Russia is one of the six main donors to the

Council of Europe's budget, along with France, Germany, Italy, Turkey, and the United Kingdom (Council of Europe Portal, 2020).

As a major donor, Russia enjoys several advantages over other CoE member states. This situation as it can be understood was quite serious for the Council of Europe as the Russian share in the overall budget was quite significant. The Council of Europe suffered a reduction of 10% of its annual budget. Russia's claims were binding on the Council of Europe to adapt its request. According to Russia, the resumption of the payment would take place only if the Council of Europe agreed to completely abolish the mechanism of imposing sanctions on the delegations of member states. All this was totally contrary to Article 3 of the Statute of the Council of Europe, for the spirit of cooperation that should exist between the member states and the Council itself. Such claims, with a boldness of demands, affect Russia's credibility if it really wants to be part of the Council of Europe or wants to underestimate the CoE's role in the international arena. Russia, as a member of the Council of Europe, should strengthen its support for the Council's policies, not fight them.

In 2018, the Russian Federation threatened to leave the international organization. Its arguments were that by not being able to vote in the Parliamentary Assembly, it could not participate in the elections of key Council of Europe officials, such as judges at the European Court of Human Rights and the Secretary-General, thus exercising political pressure on the Council of Europe to lift sanctions imposed on the Russian Federation (Netherlands Helsinki Committee, 2019). As of January 2016, there was no delegation of the Russian Federation to the Parliamentary Assembly of the Council of Europe. From the moment the Russian delegates decided not to participate in the Assembly anymore, no sanctions were directed against them. The non-participation in the Parliamentary Assembly was a decision of the Russian delegation, completely free and of their full will, despite the request to be part of the sessions of the Assembly for the years 2016-2019. The Parliamentary Assembly should have taken measures to impose internal sanctions on countries such as the Russian Federation, in order to prevent such incidents of the same nature in the future of the Council of Europe.

The effectiveness and legitimacy of the Council of Europe could be compromised if its member states do not implement international law or the co-operation agreement with the CoE and thus seek its removal or threats as it happened with Russia. The Council of Europe was hit by a budget crisis and was forced to freeze some of its projects as well as change some procedural rules. A concrete example was the case of removing the translation of the Parliamentary Assembly's work into any language and limiting it to only those languages that are the main contributors to the Council of Europe budget (Parliamentary Assembly, 2018). They were also forced not to publish numerous reports which have an informative role for the citizens of CoE

member countries and anyone interested (Parliamentary Assembly, 2018). However, this was not only a consequence for the Council but also for the people who work for the Council of Europe. As a result of the budget limit, hundreds of employees were forced to leave their jobs as it could not be afforded by the CoE.

The Parliamentary Assembly of the Council of Europe voted with 118 votes in favor and 62 against to restore Russia's voting rights, which were suspended in 2014. Despite the majority, what is understood from these figures is that a large number of countries were opposed to Russia's actions, which is beyond the policy of these states and their relations with Russia. The Ukrainian delegates left in protest during this vote (BBC News, 2019).

## **8. Risk over CoE Authenticity**

The conflict situation created between the Council of Europe and Russia attracted great international attention. This attention was accompanied by criticism of the Council of Europe and the reaction of its Parliamentary Assembly to the situation with the Russian Federation. Such criticisms were mainly related to the role of the Council of Europe in the international sphere and the risk that could follow such a step as the readmission of Russia to its bay. The Council of Europe, if it is to maintain its credibility, cannot allow a country to violate its own rules through the Parliamentary Assembly. Russia, by taking a decision such as non-payment of financial obligations to the Council of Europe, is violating the rules it has accepted since it joined the organization. The precedent set in this case directly affects the Council of Europe and its veracity. However, financial concerns likely motivated the decision to allow Russia to return. The budget crisis puts pressure on the work of the Council of Europe, but it is not the only driving force.

Russia has not taken any sanctions and this may indicate a "fear" of the Council of Europe not to remove Russia from the organization. So, it is apparently a strategy to make Russia part of it again (staying at peace with it), and it is also setting a precedent which is quite dangerous for the Council of Europe. This is because other countries with financial power for the Council of Europe can threaten to leave the organization to meet some possible requirements or conditions that they want to meet. Certainly, through this way, the organization risks the purpose of its creation and loses credibility in the millions of people who need its existence and functioning.

The veracity of the Council of Europe is not threatened by external forces, but by the actions of the member states of the Council itself. This is a threat which runs counter to the values based on the Council of Europe and which are a fundamental condition of membership. The Council of Europe's most serious dilemma is directly related to its conflict with Russia. The Council of Europe was between two options, both of which were dangerous

and with negative results. The first option and risk is related to the choice of readmission of Russia by accepting its terms, and thus "betrays" its principles and values. The second option and risk is related to the choice of Russia to leave the organization permanently due to the violations committed and threats against it, which puts the country in total danger of the existence of the organization due to the importance of the financial contribution of the Russian Federation to the Council. Placing a balance between these two dilemmas makes it extremely difficult to arrive at a solution.

## **Conclusion**

In the research conducted to better understand the Council of Europe, it was concluded that the establishment of the CoE was a very important step in helping to build the democratic institutions of post-communist Europe. This is due to the promotional role of European culture in achieving a wider union between member states, where the focus is on their common traditions of political freedom and on the principles and objectives of the rule of law and democracy.

The importance that the CoE has for each of its member states is indisputable. Russia's continued membership of the Council of Europe opens up opportunities for better protection of human rights. Another dangerous consequence of Russia's departure could be the return of the death penalty to the Russian Federation, as it was never formally abolished but was placed under a moratorium in 1996 as a precondition for CoE membership. Since then, the death penalty has not been used in Russia. When it comes to resolving the Russia-Ukraine conflict, Russia's withdrawal from the CoE cannot push Russia to reverse the annexation of Crimea or push for the implementation of the Minsk Agreements. On the contrary, it aggravates many things because without any restrictions of the country's membership in the CoE, the situation could escalate further.

High-profile cases lost by Russia in the Strasbourg Court speak to a need for "protection" for Russian citizens when they cannot find justice in their courts. Russia must continue to be part of the Council of Europe, despite their conflicting relations, which also raise doubts about what the future holds for them. If Russia leaves the Council of Europe, it will remove a tool for millions of its citizens to protect their rights and freedoms and reduce attention to violations that may occur within the country. Other problems may arise on the horizon for Russia and the Council of Europe as long as Russia still has time to strengthen its internal judicial system and better adapt to the implementation of the ECHR.

Russia's withdrawal from the Council could have serious consequences for the CoE as well as for Russia itself. It remains unquestionably unique among all CoE member states in responding to what it

perceives as direct interference in internal affairs. Russia's increasingly strained relationship with the CoE raises the question of whether Russia really wants to remain a member, and indeed wants its citizens to enjoy their rights in accordance with the law. The Council of Europe, always intervening to avoid and prevent violations by Russia, is carrying out its mission, but does this not call into question the will of the Russian Federation? Political pressure from the CoE has always been constant and a source of conflict in CoE-Russia relations, which is also interpreted as interference in domestic politics. Furthermore, the Council of Europe is not only concerned with the protection of human rights, but also with other and broader forms of cooperation. Russia, if left, could lose influence and increase its isolation by denying itself the right to participate in important Council of Europe decisions.

The mission and purpose of the Council of Europe can be considered fulfilled for the largest sphere of action of this organization, but the novelty of the conflict with Russia has raised major questions on doubts about its veracity. An organization that plays a key role in the fight against discrimination, does it not in itself stand discriminatory? This is when Russia claims to leave the CoE under threat. One of the reasons why the CoE does not want this departure and accepts Russia's return to the organization is because Russia is the largest financier of the Council of Europe. The Council of Europe should have acted against the Russian Federation and that failure to react made people to think about the veracity of the organization. On the other hand, they made people to think that if it had acted and removed the Russian Federation from the Council, it would have admitted so openly that it could not cooperate with a member state of it. As a result, it was damaging its reputation as an organization and its strength in the international arena was called into question. Although the organization is not responsible for the reactions of member states, it remains responsible for the way it will react when faced with such a conflict situation. Conflict situations, various dilemmas and assumptions about possible solutions lead to the conclusion that the truthfulness, credibility, and the effectiveness of the Council of Europe will always be a question mark, as long as its focus and importance is high.

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## **Generational Cohort and Work-Life Balance Policies Preference Among University Senior Teaching Staff in Ghana: Does Gender Matter?**

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### **Abstract**

The study sought to examine work-life balance (WLB) policies preference among generational cohorts concerning gender. Being quantitative, a population of 714 with a sample size of 333 was selected, but 306 responded. The main independent variable was gender while the dependent variable was work-life balance policies with four dimensions: Flexible Work Arrangement; Wellness and Personal Development; Leave Arrangement and Dependent Care Assistance. The data was analysed using inferential statistics. The study results showed that except for Wellness and Personal Development, where gender difference between males and females of Generation Y existed, gender did not differ significantly from the rest of the policies. Therefore, it was recommended that there should be equal treatment of both males and females in implementing WLB policies.

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**Keywords:** Work-life balance, Policies preference, Gender, Generational cohort, University, Ghana

## **Introduction**

In today's world, diversity in the workplace is not only characterised by various racial and or ethnic groups but also, by several employees from various generations. The different generations who work with each other in the same organisations also experience increasing workloads forcing them to work several hours. The ramification of this is that most of these employees spend long hours at their workplaces, reducing staying at home (Kapoor & Solomon, 2011). Such a practice has further deepened the work demands on employees leading to stress and work imbalances, which are harmful to workers' health (Bannai & Tamakoshi, 2014). This is especially true, to a large extent in the tertiary institutions, where most of the staff like the senior academic teaching staff, are supposed to be involved in their job almost at all times. Such an engagement potentially leads to the loss of traditional differences between work-life and family life.

Largely, there are four generational cohorts of employees that are involved in today's work-life balance (WLB) challenges. They include 'Traditionalists' who were born between 1925 and 1945; Baby Boomers (1946 – 1964); Generation X (1965 – 1980), and Generation Y (1981 – 1999) (Lester, Standifer, Schultz & Windsor, 2012). Each of these generations is characterised not only by different time horizons and environments but also affected by various events. Accordingly, there have been huge variations in generational choices and or preferences (Inglehart, 1997; Aydemir, Dinç & Çağlar, 2016). This assertion is backed by the generational cohort theory which explains how generations under normal circumstances share values and viewpoints of the world, and how a generation tends to vary from one another. This suggests that the understanding each generation has about this world differs and these differences shape their opinions, which also have an impact on the behaviours and expectations of each generational cohort at the workplace (Kapoor & Solomon, 2011).

In the context of Ghana, both men and women within each generational cohort have been saddled with the issue of work-life balance (WLB). Women in each of the cohort, for example, besides working in formal paid jobs, are the ones who bear the greater portion of domestic tasks such as child nurturing and making meals for the family causing them to have insufficient time for neither their homes nor professional works (Porter & Ayman, 2010). On the part of men, they still bear their families' financial burdens and need to work long hours outside their homes, which makes them incapable of having enough time for their family members (Annor, 2014). In each of these cases, apart from the work disturbing the family and social lives, the pressures from the family also significantly affect their outputs, particularly those in the tertiary institutions (Mabokela & Mlambo, 2015). In these institutions, most of the staff like the senior academic members are often faced with work-life

imbalances as they often take on the diverse roles of teaching, mentoring, advising, supervising, researching, community services, and institutional assignments. They have to struggle to fulfill these professional roles and their roles as a wife, husband, mother, uncle, or aunt (Annor, 2014; Mabokela & Mlambo, 2015). The magnitude of these roles makes it stressful for them to find stability between their professional and private life.

Consequently, the nature of these synchronous demands in working and family life often calls for workers to relentlessly seek to balance life by taking into account the good WLB policies in their institutions (Burke & Mikkelsen, 2005; Nwagbara, 2020). However, while several WLB policies might have been implemented, we need to be mindful of the probable gendered ways in which they are expected to be used among generations. In other words, gender matters when it comes to understanding the effects of WLB policies (*Doble & Supriya*, 2010). From the point of view of Chung and Lippe (2018), the use and preference for flexible WLB policies among men and women are different in so many ways which lead to different consequences for wellbeing and work intensification. To this end, we need to address WLB across genders, as expectations and coping styles can be seen to be divergent (Baick & Drew, 2006; Parker, 2007).

However, even though many studies have addressed WLB flexible policies and the nuanced gendered ways in which it may mean different things for men and women, there are some caveats that this study attempts to tackle. For example, according to Chung and Lippe (2018), one of the most significant caveats of the earlier studies on this issue is that they are primarily based on qualitative data, with most interviews and observations as research tools. Additionally, even those using quantitative data (Wight, Raley & Bianchi, 2008; Craig & Powell, 2011, 2012) mostly employed data from the developed countries. However, because work cultures and gender norms are different in these Western countries compared to those in Africa, and for that matter Ghana, the genders prefer WLB policies that are expected to be different. Moreover, the fact that they are from different generational cohorts suggests that differences are likely to exist between males and females. Therefore, there is the need to have more evidence from a wider range of countries and in different contexts in Africa to appreciate how WLB policies can lead to different results for men and women across generational cohorts (Chung & Lippe, 2018). In light of this, the study was conducted to unearth the all-inclusive WLB needs of full-time working people of the Ghanaian tertiary sector workforce.

Thus, the purpose of the study was to investigate how WLB policies preference differs with respect to gender among different generational cohorts of senior academic members of the University of Cape Coast, Ghana. Specifically, the focus was on whether female and male elements of

generational cohorts differ in their policy priorities across four meaningful WLB policy areas in the context of Ghana.

### **Study Hypothesis**

**H<sub>1</sub>: There is a significant difference in WLB policies preference among generational cohorts with respect to gender in the University of Cape Coast senior teaching staff.**

In terms of significance in Ghana, the study contributes to appreciating the variances that pertain to generational cohorts in tertiary institutions in terms of WLB policies preferences by gender. Besides, gender is too broad to be studied without contextualisation (Chung & Lippe, 2018; Chung & Van der Horst, 2018), and so by contextualising the study in terms of institutions, occupation, and country, we are able to gain better insight into WLB policies preferences which will be helpful to organisations in designing gender-specific measures to address work-life imbalances. Finally, the results would augment the existing body of knowledge on generational cohort and WLB policies preferences concerning gender, because no study has been conducted in the context of gender in tertiary institutions in Ghana.

With the study background discussed, the rest of the paper is organised as follows: First, a review is given on the literature, which focuses on the theory underpinning the study, the concepts of generational cohorts, WLB, as well as gender and WLB. The following section focuses on methodology. This is followed by discussions on the findings and ends with the study's conclusions.

### **Literature Review**

The theory used to support this study was the generational cohort theory, which explains why variations exist between different generations of workers (D'Amato & Herzfeldt, 2008; Edmunds & Turner, 2005). Being advocated by Strauss & Howe (1991), the theory claims that important historic events and social changes in society influence the values, attitudes, views, and disposition of persons within a given cohort. It further explains how historical occurrences and social experiences that happen in the formative stage instead of the later years of persons affect and influence their opinions and values when they grow. That means that historical incidents can shape individual generations in both childhood and adulthood life. The generational cohort theory supports this study because it clarifies how the constituents of the same generation share similar values and perspectives of the world. This would help us understand the extent of the discrepancies and similarities between female and male constituents of generational cohorts in terms of preference for WLB policies in the tertiary institutions in Ghana.

## **The Concept of Generational Cohorts**

Mannheim (1998) defines a generation as a group of people who share common habits and culture. This definition is further strengthened by Kopperschmidt (2000) who asserts that generation is a group of people who have the exact date of birth and experiences, and are affected by the same crucial factors during their growing periods. A standard chronological delineation of a "generation" involves a birth period of roughly twenty years (Wilson et al., 2008). The two key factors associated with generation are; date of birth and events associated with the period (Crumpacker & Crumpacker, 2007). Thus, a generation is characterised by the shared attitudes, happenings and inclinations that mature in the environment of social and economic experiences of a well-defined period (Lancaster & Stillman, 2002; Howe & Strauss, 2000).

Considering the above discussion, a generational cohort can be considered to be a group of persons born within the same historical moment and are shaped by common happenings and situations at the time of their youth and adolescence (Howe & Strauss, 2000). In essence, these are the people who during the same period, have experienced comparable real societal and historical events during their years of maturity, a period between late adolescence and early adulthood years (Rogler, 2002). These individuals' lives are moulded by events that happen when they are young and adolescent and have left influential tracks concerning power, organisations and family responsibilities (Arsenault, 2004). Situations that prevailed in their adolescence, such as political, social, economic, and sociological forces, influenced the attitudes and opinions of a cohort (Lancaster & Stillman, 2002). This makes year range a strong defining factor of generational cohorts regardless of geographical location (Lancaster & Stillman, 2002).

## **Frameworks of Cohorts**

There are various compositions of generational cohorts with their year ranges and names. A review of existing literature reveals that names are used to describe the cohorts such as Veterans for the Silent Generation, Baby Busters for Generation X, GenNext or Millennials for Generation Y (Arsenault, 2004). However, Zemke, Raines and Filipczak (1999) had listed the following birth years for the generations: Silent generation (traditionalists) (1922-1943); Baby Boomers (1944-1960); Gen X (1961-1980); Gen Y (1981-2000). According to Lancaster and Stillman (2002), some birth ranges like that of the Traditionalist, goes as far as forty years' span.

In the context of this study, the Silent Generation (born 1922-1943) who are individuals over 70 years now and therefore are on retirements, are not included. In view of this, this study focuses on the three-generational

cohorts who are currently in the Ghanaian labour force. These are The Baby Boomers (born 1946-1964); Generation X (born 1965-1980), and Generation Y (born 1981-1999). Some studies like that of Oblinger and Oblinger (2005), have shown that there is the development of the fifth-generation, known by them as the Post Millennials describing those born from 1995 to 2015. These fifth generational cohorts are in their developmental stages since the majority, if not all, are yet to fully join the labour force in Ghana (Labour Force Statistical Report, 2015).

In terms of the characteristics of Generational Cohorts, the Baby Boomer generation is often described as materialistic workaholics who desire self-fulfillment and place a high value on work and the acquisition of things, sometimes at the expense of family (Gentry, Griggs, Deal, Mondore & Cox, 2011). The Generation Xers (GenXers) follow the Baby Boomers (Lyons & Kuron, 2014), and are noted as being comfortable with diversity and change (Gentry et al., 2011), skeptical and individualistic (Constanza, Badger, Fraser, Severt & Gade, 2012), risk-tolerant, and entrepreneurial (Gentry et al., 2011). The Generation Y or the Millennial cohort represents those born since 1981. They are characterized as coming of age in an era of 24-hour web-based connectedness, possessing an inflated sense of self, and believing that they can achieve anything (Deyoe & Fox, 2012). They are also considered to be socially conscious but highly cynical and narcissistic (Costanza et al., 2012).

### **Work-Life Balance (WLB)**

WLB is generally defined in so many ways. For example, Grzywacz and Carlson (2007) considered WLB as the "accomplishment of role-related expectations that are negotiated and shared between an individual and his/her role-related partners in the work and family domains" (p. 66). Greenhaus, Collins and Shaw (2003), on the other hand, define it as "the extent to which an individual is equally engaged in, and equally satisfied with his or her work role and family role" (p. 513). However, in the context of this paper, the understanding of WLB is based on the notion that, both paid work and social life must be less visible as priorities that are competing with each other but as complementary sides of a full life. While this viewpoint may consider different factors, it takes into account the social and contextual matters, as well as organisational based issues. In a sense, this perspective is in line with Clarke, Koch and Hill (2004), who opined that in general, WLB has to do with an acceptable degree of 'fit' between the numerous responsibilities in an individual's life. Thus, the core thrust of WLB is that work and private lives should be seen more as harmonising ingredients of a complete life than as competing priorities.

There are three major components to WLB: balance: time, involvement and satisfaction (Greenhaus et al., 2003). Time balance involves dedicating suitable quantities of time to work and life roles. Involvement balance implies obtaining identical intensities of psychological rendezvous in work and life roles. Satisfaction balance is getting equivalent degrees of contentment from work and life roles. The contention is that WLB is a type of inter-role divergence where responsibility demands emanating from the work and life spheres of influence are jointly incompatible in certain ways (Lewis, 2008). Pasamar and Valle (2015) have argued that lack of WLB can endanger an individual's health and well-being, subsequently affecting productivity, commitment, and employee turnover. Additionally, Felstead, Gallie and Green (2002) opined that the absence of WLB can significantly impact an individual's psychological and mental state.

### **Gender and Work-Life Balance**

According to Fapohunda (2014), gender is one of the general dimensions on which variations in status are based. To the author, gender is a socially constructed concept that lays down the socially and culturally agreed roles that males and females are expected to perform. It comprises those social, cultural and physiological facets related to males and females through specific social contexts. The roles of females and males are often described variously in different cultures. Women's domestic tasks and childcare activities often affect the nature of work they tend to like, and the relationship between WLB policies like flexible working and work-family conflict has different consequences for men and women (Van der Lippe, Van Breeschoten & Van Hek, 2019). Moreover, different WLB policy arrangements may not have the same results for men and women. For example, WLB policies established by governments and organisations tend to permit women, especially those with dependent children, to work fewer hours to intensify the time available for their family and other responsibilities (Fujimoto, Azmat & Härtel, 2012). On the other hand, men usually have to handle imbalanced prospects of personal life, as they are typical to work full time, since they are the ones who are expected to bear the family's financial responsibilities (Lewis, Brannen & Nilsen, 2009). Despite these disparities between men's and women's working patterns, there are serious challenges faced by full-time working women. Pocock, Skinner and Pisaniello (2010) revealed that women have been found to have higher work-life interference per hour worked and more dissatisfaction than men when working for more than 35 hours per week, hence a higher preference to reduce their work hours men do. To this end, in advancing a better understanding in this changing world of work, we need to understand that there are disparities in expectations and handling styles across genders (Baick & Drew, 2006; Klapper & Parker, 2011).

In the context of Africa, even though domestic tasks and the labour market compete for women's time and energy, and therefore have difficulties in having WLB, most young women would rather prefer to have careers than to stay at home (Fapohunda, 2018). In the same vein, men are realising that work alone may not give satisfaction and want a balance between paid work and private responsibilities without maltreatment at work (Nwagbara, 2020). They are often seeking substitutes and flexibility, as this is to help them have more time with their families, even though working less implies a smaller income (Oloyede, 2012).

### **Research Method**

This study employed the quantitative research approach with a descriptive survey design. The population was made up of all senior academic members of the University of Cape Coast, which numbered 714. This was made up of 580 males and 134 females. Per the distribution of senior staff population by cohorts, Baby Boomers were 188, Gen X were 360 and Gen Y were 166 (University of Cape Coast Directorate of Human Resource, 2018).

The sample size was 333 respondents and this was carefully chosen based on the G-Power version 3.1.9.2 software, which gave a sample of 302. Ten percent was included to accommodate the nonresponse rate, bringing the sample size to 333. G-power was used because it was considered the most expedient method to compute power using power analysis software (Erdfelder, Faul & Buchner, 1996). Besides, G-Power prevents the use of complex tables and formula works and offers the researcher the power to include the "test family" (e.g., t-tests, F tests), the type of power analysis (i.e., a priori), and the input parameters (i.e., tails(s), effect size, power, etc.). This, therefore, tailors the sample size more closely to the research in question.

For the sampling procedure, stratified random sampling was employed. The researchers considered it imperative to gain information about key subgroups of the population, which is the teaching staff in their respective cohorts namely: Baby Boomers, Generation X and Generation Y. This method was used taking into consideration Sarantakos (1993) and McBurney (2001) recommendation that, if the population one intends to survey has identifiable subgroups, a stratified random sample can be used to improve accuracy. After the stratification procedure, simple random sampling was employed to select the respondents from each stratum.

About the data collection instrument, a questionnaire was employed. A set of written questionnaires on WLB was adopted from Lingard and Francis (2005) after a thorough review of extant literature. The questionnaires were 20 and dealt with the extent to which senior academic members agreed that certain WLB policies were preferred in terms of balancing their lives. It was a five-point rating scale on level of agreement, with one (1) indicating "least

level of agreement" and five (5) meaning "highest level of agreement" to the policies. The questionnaire was self-administered and the respondents were comfortable responding to the questionnaire because of the assurance of strict confidentiality. There was a 93.39 percent return rate of administered questionnaires representing 311, of which five had incomplete information. Thus, a total of 306 were used for the final analysis.

In processing and analysing the data, the completed questionnaires were edited for consistency and clarity, coded and entered into SPSS version 22.0. The study objective was analysed based on the hypothesis below:

**H<sub>1</sub>: There is a significant difference in work-life balance policies preference among a generational cohort of senior academic members with respect to gender at the University of Cape Coast.**

The testing of the hypothesis was divided into three, based on the generational cohorts. This was analysed using a multivariate analysis of variance (MANOVA) in order to authenticate whether there was a WLB preference within the gender of each generational cohort. The dependent variables were the WLB policy constructs while the independent variable was gender. These policy constructs were Wellness and Personal Development; Flexible Work Arrangement; Leave Arrangement and Dependent Care Assistance. In all aspects, the analysis was expected to reveal the results of the MANOVA, which would provide the combined effect of the differences that exist between all the dependent and independent variables. Even in situations where we failed to reject the null hypothesis, the researchers went further to do a follow-up test to see how each dependent variable differed from the independent variable.

## **Results and Discussions**

The demographic information gathered on the respondents showed that 154 of teaching staff representing 50.8 percent, fall within the Generation X cohort, followed by 80 Baby Boomers representing 26.4 percent, and finally, 72 Generation Y representing 23.7 percent. This outcome is not surprising because many of the teaching staff who are Baby boomers are retiring because of the mandatory retirement age in Ghana (Labour Force Survey Report of Ghana, 2015) while Gen Y is now coming on board due to their age and educational qualifications. In terms of gender, the result indicated that 202 males representing 66 percent labour force of teaching staff dominated, while the females were 104 representing 34 percent. Although there have been improvements, more needs to be done.

In the case of testing the hypothesis formulated, the results for various generational cohorts in terms of gender are presented in the tables below.

## Generation Y

Table 1 presents the results of the MANOVA at the 0.05 level with Gender as the independent variable and WLB constructs as the dependent variables.

**Table1:** MANOVA of WLB Polices Within Gender of Gen. Y

Effect		Value	F	Hypothesis sis df	Error df	p-value
Intercept	Pillai's Trace	.976	668.107 <sup>b</sup>	4.000	67.000	.000
	Wilks' Lambda	.024	668.107 <sup>b</sup>	4.000	67.000	.000
	Hotelling's Trace	39.887	668.107 <sup>b</sup>	4.000	67.000	.000
	Roy's Largest Root	39.887	668.107 <sup>b</sup>	4.000	67.000	.000
Gender	Pillai's Trace	.103	1.923 <sup>b</sup>	4.000	67.000	.117
	Wilks' Lambda	.897	1.923 <sup>b</sup>	4.000	67.000	.117
	Hotelling's Trace	.115	1.923 <sup>b</sup>	4.000	67.000	.117
	Roy's Largest Root	.115	1.923 <sup>b</sup>	4.000	67.000	.117

Source: Field Survey (2019)

The results presented in Table 1 indicate no statistically significant difference at the  $p < 0.05$  level in the preference of importance in WLB policies within the gender of Generational Y [ $F = 1.923$ ,  $p < 0.05$ ]. From the results presented in Table 1, the Sig Value of F-Stats of 1.923 is 0.117, which is greater than the significance level of 0.05. Thus, we fail to reject the null hypothesis that "There is no significant difference of work-life balance policies preference among generational Y cohort concerning gender among teaching staff in the University of Cape Coast" and conclude that the means among the different gender of Generational Y are equal with regards to their preference on importance of WLB policies.

As earlier indicated, a follow-up analysis was done to find out the individual effects, and the results were presented in Table 2.

**Table 2:** Test of Between Subjects Effects of Generation Y for Gender

Dependent Variable	Independent Variable	Mean	Standard Deviation	Df	F	p-value
FWA_C	MALE	2.9952	0.67497	1	0.21	0.885
	FEMALE	3.0200	0.76357			
LA_C	MALE	3.1952	0.73184	1	1.629	0.206
	FEMALE	3.4200	0.74343			
WPD_C	MALE	3.0536	0.78580	1	6.781	0.011**
	FEMALE	3.5667	0.87576			
DCA_C	MALE	3.0397	0.70308	1	0.794	0.376
	FEMALE	3.1889	0.69719			

Source: Field Survey (2019)

**Key:** WPD\_C = Wellness and Personal Development Construct  
 FWA\_C = Flexible Work Arrangement Construct  
 LA\_C = Leave Arrangement Construct  
 DCA\_C = Dependent Care Assistance Construct

From Table 2, the results indicate that there was a statistically significant difference between Gender (male, female) of Generation Y concerning the Wellness and Personal Development Construct ( $F [1] = 6.781, p < 0.05$ ). In this case, the mean difference value was 0.5131 in favour of Females. With the mean score, Male ( $M=3.0536, SD= 0.78580$ ) was significantly different from Female ( $M=3.5667, SD= 0.87576$ ). This tends to support the findings of Lingard & Francis (2005), where females showed a higher preference for wellness and personal development initiative.

However, gender did not differ significantly from Flexible Work Arrangement, Leave Arrangement and Dependent Care Assistance [ $F (1) < 1.630, p > 0.05$ ]. According to the means and contrary to the expectation, each WLB Policy Construct was valued virtually the same by Male and Female, with Wellness and Personal Development being an exception. Therefore, the hypothesis "There is no significant difference in work-life balance policies preference among generational Y cohort regarding gender among teaching staff in the University of Cape Coast" was partially supported.

### Generation X

With regards to Generation X, the result of the MANOVA at the 0.05 level was presented in Table 3

**Table 3:** MANOVA of Work-life balance Policies within Gender of Gen. X

Effect		Value	F	Hypothesis df	Error df	p-value
Intercept	Pillai's Trace	.974	1411.509 <sup>b</sup>	4.000	149.000	.000
	Wilks' Lambda	.026	1411.509 <sup>b</sup>	4.000	149.000	.000
	Hotelling's Trace	37.893	1411.509 <sup>b</sup>	4.000	149.000	.000
	Roy's Largest Root	37.893	1411.509 <sup>b</sup>	4.000	149.000	.000
Gender	Pillai's Trace	.045	1.740 <sup>b</sup>	4.000	149.000	.144
	Wilks' Lambda	.955	1.740 <sup>b</sup>	4.000	149.000	.144
	Hotelling's Trace	.047	1.740 <sup>b</sup>	4.000	149.000	.144
	Roy's Largest Root	.047	1.740 <sup>b</sup>	4.000	149.000	.144

Source: Field Survey (2019)

The Table 3 result indicates no statistically significant difference at the  $p < 0.05$  level in the preference of importance in WLB policies within the gender of Generational X [ $F = 1.740, p < 0.05$ ]. From Table 3, the p-value of F-Stats of 1.740 is 0.144, greater than the significance level of 0.05. Thus, we fail to reject the null hypothesis that "There is no significant difference of WLB policies preference among generational X cohort with respect to gender among teaching staff in the University of Cape Coast" and conclude that means among the different gender of Generational X are equal with regards to their preference on importance of WLB policies. This tends to support the findings of Antecol, Bedard, and Stearns (2016) who noted that Gen X had "career moms" and as this took place in their early stages, they became aware that they would have to choose, as their mums did. This has made this generation natural allies with women on "work-life balance" challenges and has more advanced opinions on the potentials of females, hence exhibiting more balance between male and female ways of reasoning and working.

To find out the individual effects, a follow-up analysis was done and the results were presented in Table 4.

**Table 4:** Test of Between Subjects Effects of Generation X for Gender

Dependent Variable	Independent Variable	Mean	Standard Deviation	Df	F	p-value
FWA_C	MALE	2.6552	0.64955	1	3.103	0.080
	FEMALE	2.8694	0.80576			
L_C	MALE	3.0705	0.67879	1	1.500	0.223
	FEMALE	3.2122	0.64731			
WPD_C	MALE	2.9429	0.77851	1	0.015	0.901
	FEMALE	2.9592	0.72051			
DCA_C	MALE	2.9032	0.66578	1	0.397	0.530
	FEMALE	2.8333	0.58333			

Source: Field Survey (2019)

From the results presented in Table 4, it can be concluded that there was no statistically significant difference between Gender (male, female) of Generation X ( $F [1] = 1.740, p < 0.05$ ). Gender did not differ significantly from all the four main WLB policies [ $F (1) < 3.1040, p > 0.05$ ]. Conferring from the means and contrary to the expectation, each WLB Policy Construct was valued virtually the same by gender. Therefore, the hypothesis "There is no significant difference in WLB policies preferences among generation Y cohort regarding gender among senior teaching staff in the University of Cape Coast" was supported.

The explanation for this indifference is that both males and females within Gen Y rate freedom and leisure comparatively higher than the other two generations (Gibson, Greenwood & Murphy, 2009; Twenge, 2010). In addition, in contrast to the women from the baby boom generation, the young women from Gen Y are focused on economic independence and are very career-oriented (Twenge, Campbell, Hoffman & Lance, 2010), hence will like to have the same WLB policies preference as men.

### Baby Boomers

In the case of the Baby Boomers, the result of the MANOVA at the 0.05 level was presented in Table 5

**Table 5:** MANOVA of WLB Polices Within Gender of Baby Boomers

Effect	Value	F	Hypothesis df	Error df	p-value
Intercept Pillai's Trace	.975	740.010 <sup>b</sup>	4.000	75.000	.000
Wilks'	.025	740.010 <sup>b</sup>	4.000	75.000	.000
Lambda <sup>t</sup>	39.467	740.010 <sup>b</sup>	4.000	75.000	.000
Hotelling's Trace					
Roy's Largest Root	39.467	740.010 <sup>b</sup>	4.000	75.000	.000
Gender Pillai's Trace	.038	.731 <sup>b</sup>	4.000	75.000	.574
Wilks' Lambda	.962	.731 <sup>b</sup>	4.000	75.000	.574
Hotelling's Trace	.039	.731 <sup>b</sup>	4.000	75.000	.574
Roy's Largest Root	.039	.731 <sup>b</sup>	4.000	75.000	.574

Source: Field Survey(2019)

Table 5 results indicate no statistically significant difference at the  $p < 0.05$  level in the preference of importance in WLB policies within the gender of Baby Boomers [ $F = .731, p < 0.05$ ]. The p-value of Table 5 of 0.731 is 0.574 which is greater than the significance level of 0.05; thus we fail to reject the null hypothesis "There is no significant difference of WLB policies preferences among Baby Boomers generational cohort for gender among senior teaching staff in the University of Cape Coast. Thus, we concluded that means among the different genders of Baby Boomers are equal regarding their preference on the importance of WLB policies. This is because Baby Boomer women strived to "have it all" and fingered that "fitting in" and making it in

the business world necessitate that they downplay their femininity (Turner, 2017). This could explain why females always wanted to be at par with men, leading to no gender differences.

The follow-up analysis was done to find out the individual effects, and the results are presented in Table 6.

**Table 6:** Test of Between Subjects Effects of Baby Boomers for Gender

Dependent Variable	Independent Variable	Mean	Standard Deviation	Df	F	p-value
FWA_C	MALE	2.9236	0.56633	1	0.902	0.345
	FEMALE	2.7920	0.59296	1		
L_C	MALE	3.1418	0.67294	1	0.850	0.359
	FEMALE	3.2960	0.73738	1		
WPD_C	MALE	3.0000	0.73283	1	0.687	0.410
	FEMALE	3.1400	0.62115	1		
DCA_C	MALE	3.0091	0.61982	1	0.229	0.634
	FEMALE	3.0800	0.60116	1		

Source: Field Survey (2019)

The results presented in Table 6 indicate that there is no statistically significant difference between the Gender (male, female) of Baby Boomers ( $F [1] = 1.740, p < 0.05$ ). Thus, gender did not differ significantly from all the four main WLB policies [ $F (1) < 3.1040, p > 0.05$ ]. Conferring from the means and contrary to the expectation, each WLB Policy Construct was considered practically similar by Male and Female. Therefore, the hypothesis "There is no significant difference in WLB policies preference among Baby Boomers generational cohort regarding gender among senior teaching staff in the University of Cape Coast" was supported. This result is not surprising because both male and female baby boomers are seen as workaholics and thus tend to prioritize their work (Crampton & Hodge, 2007). In general, because both men and women of the baby boomers feel pressure to take care of children or grandchildren and aging parents simultaneously (Kupperschmidt, 2000), they would all be interested in being supported by care facilities such as care leave. Nevertheless, they would not be interested in using flexible opportunities as working from home since that is quite unusual for them (Beutell & Witting-Berman, 2008).

## Conclusion

The study sought to examine WLB policies preference among generational cohorts for gender among the senior teaching staff at the University of Cape Coast. In line with literature, there were two sided views with differences in gender and WLB policies preferences. On one side, the study found gender differences between males and females of Generation Y concerning the Wellness and Personal Development Construct ( $F [1] = 6.781,$

$p < 0.05$ ). In this instance, there was a significant difference between the two where females showed a higher preference for wellness and personal development initiatives. However, gender did not differ significantly from Flexible Work Arrangement, Leave Arrangement and Dependent Care Assistance [ $F(1) < 1.630, p > 0.05$ ]. Indeed, both Males and Females were virtually the same on these three policies. Thus, while full-time working men would like to work excessively long hours and control their job context, it is with women. However, in the African context, full-time working women are confronted with narrower range of social activities outside their work due to their traditional responsibilities of caring for the family, thereby necessitating their flexible working hour arrangements. In essence, our finding suggests that lack of incentives like flexible working hours and lack of managers' care can affect men the same way as women.

Implicitly, these findings imply that, just like men, full-time working women need fair and equitable WLB policy options as well as management understanding to allow them to control and succeed in their work and non-work roles with greater flexibility. Once managers and supervisors show greater sensitivity towards their socially constructed dilemmas, women like men will be able to balance their dual roles better, which can positively affect their career advancements (Atkinson & Hall, 2009). With both men and women facing conflict because of long working hours and excessive job demands, there is employers for both men and women greater control over how they manage the needs of their job. Once employers demonstrate greater sensitivity to men and women's gendered dilemmas about their job demands (including long working hours), they can be expected to gain more control over their WLB, which in turn, would lead to increased productivity in academia (Rafnsdóttir & Heijstra, 2013).

### **Recommendations**

Based on this study findings, it is suggested that, rather than focusing on further developing WLB policies, practices and programmes at the institutional level, management should be sensitive to provide university senior staff a greater sense of control in managing their work and non-work lives within their given social context to attain their WLB. University authorities must understand their senior staff's gender needs. Such understanding should be followed by providing greater discretion to decide when, where, and how their job is to be done, which can bring about greater work and non-work satisfaction (McDonald, Brown & Bradley, 2005). In addition, there is a need for improved gender-friendly work-life balance options like childcare options and organisational assistance through individual breaks, childcare within institutional premises, flex schedules, working from home, and part-time work.

Secondly, the University of Cape Coast should incorporate more Dependent Care Assistance policies, for example, special scholarships for employees' children and elder care services in their WLB policies. This is because all cohorts embrace Dependent Care Policies as a vital component of Work-life balance policies that aid in balancing their lives. When such policies are implemented, it solves issues of imbalance from the family on work, which could positively impact organisational productivity and employee performance as a whole. The government and organisations should further enhance more dependent policies because for all generations, the concept of family can never be overlooked. This could be seen from the high agreement given to Dependent Care Assistance Policies.

Thirdly, organisations must pay crucial attention to meeting the needs of Generation X in balancing their lives. The reason is that this generation is currently the largest workforce and results from the study indicated that they had the least agreements on how the available policies were important in balancing their lives. As the generation that strongly agitated for work-life balance policies, implementers and managers must seek to satisfy their needs or fear losing them to other organisations, once this group perceives imbalance. Hence, leading to low productivity.

Also, gender should not be given much attention when handling WLB policies. Rather, the concentration of managers should be keener to generational diversity. Over the past decade, the variations between males and females at work are becoming an issue of the past as females are taking up roles meant for men and again, we have both men and women being breadwinners now.

### **Suggestions for Further Research**

The present study examined work-life balance policies among teaching staff generational cohorts at the University of Cape Coast. Further studies can be done by replicating this in other universities. Individual factors such as emotional intelligence and job engagement and environmental factors like advanced technology may affect the results and, therefore, be considered in further studies. Additionally, a comparative study of work-life balance policies among universities and widening it to cover work-life balance policies among generational cohorts for non-teaching staff could be studied.

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## The Themes of 'Proactivity' and 'Reactivity' in Achebe's 'Marriage is a Private Affair'

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### Abstract

The present study sets out to investigate the themes of 'proactivity' and 'reactivity' in Chinua Achebe's 'Marriage is a Private Affair'. First, definitions for these concepts are established, and then the main characters' responses which run in their speeches and actions are pored over considering these definitions. Throughout the present study, 'proactivity' and 'reactivity' are construed as conscious cognitive choices rather than personality traits and acting proactively or reactively (assertively or submissively) is beheld as contextually bound and as determined by what floats on the surface rather than by what hides in the unconscious. Drawing upon the critiques of the concepts of 'proactivity' and 'reactivity', and having in mind that 'proactivity' and 'reactivity', as their lexical meanings may suggest, are two ends for the same dimension of doing something, one could safely claim that despite all Nene's (a character) proactive efforts to cultivate friendship with her in-laws, only after going some way towards the traditional position and reacting positively to the socially- imposed patterns considered to be crucial determinants of her acceptance in the extended family network she is admitted in the cosmopolitan Ibo community. Finding her feet there, she partakes in the construction of a new more open and accommodating Ibo identity. Two other important themes that seem to emerge strongly in the present study are that marriage is a tribal matter that should be framed within allegiance and respect for family

traditions and religious affiliation, and that family can tackle any problem if its members stand as one strong front against any external antagonistic power.

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**Keywords:** Proactivity, Reactivity, Achebe, In-law, Marriage

## **Introduction**

Crant (2000) posits that the word 'proactive' has been developed in different kinds of literature and by multiple separate systems. This point is further emphasized by Berger-Wallister (2012) who allege that the word 'proactive' was coined in the 1930<sup>s</sup> within the realm of experimental psychology to denote the 'impairment or retardation of learning or of the remembering of what is learned by effects that remain active from conditions prior to the learning'(Berger-Wallister, 2012, pp. 16-17), and it has, since then, been both used and misused in the different subject matters.

As the above quotation indicates, the original usage of the word 'proactive' associates its meaning with memory inhibition. Considering this meaning in light of the dictionary meaning of the word: '*acting in anticipation of future problems, needs or change*' (Merriam-Webster, Inc. 1994), one could claim that the word's original meaning has metamorphosed, and it has acquired different meanings, probably as a result of being used in contexts independent of the original context in which it first appeared.

Furthermore, Banks, (1999) contributes the insufficiently developed point that the word 'proactive' does not have an equivalent in many of the European languages. A possible justification for this word not to be decoded in the lexical systems of these languages is its lack of clearly conceivable defining properties, which, also, justifies Parker and Pindl's (2017) turning their attention away from empirical proactive/reactive traits embedded in the individual's inaccessible psychological systems of beliefs, attitudes, and values, to the description of observable proactive/reactive behavioral choices that the individual consciously makes in connection with certain situations.

Parker and Pindl's shift from 'proactive/reactive personality' to 'proactive/reactive behavior' is congruent with the purpose of the present study, which seeks to explore the concepts of 'proactivity' and 'reactivity' as behavioral tactics and cognitive choices each of which appears in connection with a special situation that floats to the surface. The present study turns pure psychoanalytic literary criticism outside its scope, and instead, deals with the choice of response whether proactive or reactive as a behavioral choice dictated by contextual variables rather than by personal predilection.

## **Analysis**

Proactive behavior implies the positive connotations of taking initiative and engaging in a self-directed, active role to bring about meaningful

change in oneself or situation (Andersson,2015; Crant, 2000; Covey 1989; Frese & Fay, 2001; Grant & Ashford, 2008; Unsworth & Parker, 2003), and proactive people are creators of change in their environment (Yücel, et al, 2016).

Related to the concept of 'proactivity' is that of 'reactivity', which is broadly defined as the tendency to cope with circumstances rather than to configure them, as opposed to proactivity which involves seeking information and opportunities for improving things (Crant, 2000). Also, the contrast between the two terms is clearly spelled out by Covey (1989) who juxtaposes proactive and reactive tendencies saying that:

*The ability to subordinate an impulse to a value is the essence of the proactive person. Reactive people are driven by feelings, by circumstances, by conditions, by their environment. Proactive people are driven by values - carefully thought about, selected and internalized values' (p. 34)*

One reads in the above quotation that reactivity is subtly interpreted as being emotional and affective, whereas proactivity is surmised to involve forethought and pre-determination. This point could be ignored as it falls within the domain of psychoanalysis which is, as has just been stated, outside our present concern, but an interesting point also emerges pertaining to proactive reaction as stimulating for others, in contrast to reactive response which implies waiting for things to happen and allowing situations to make decisions in lieu of the reactive response maker. Furthermore, it is implied in the quotation that proactivity and reactivity are not antithetical but could better be thought of as two opposite sides of the same coin or two ends of the same aspect.

Having established the foregoing background, the study proceeds to identify the themes of 'proactivity' and 'reactivity' which, according to our inspection, have a persistent presence in Achebe's ' Marriage is a Private Affair' and are seen throughout the story. To identify the theme(s) of the story, one needs first to get a grasp of its plot, which runs as follows: an Ibo (a Nigerian ethnicity) man named Nnaemeka has deliberately chosen to break away from the demands and expectations of the rural background where he has traditionally lived and to marry an Ibibo woman (another Nigerian ethnicity). By this marriage which has taken place in the city of Lagos -without his family's consent- Nnaemeka has dispensed with community traditions and has opted for a westernized lifestyle on account of being a member of the educated segment of Nigerian society that lives and works in the city of Lagos, and that has been exposed to the outside worldview.

The narrative begins with Nene, a newlywed schoolteacher, poses, with the truth-seeking attitude of an educator, a question to her intended. Upon her engagement, she has demonstrated an earnest desire to pursue the bigger

picture of her prospective marriage by taking the initiative to start the process of establishing a rapport with her family-in-law:

*Have you written to your dad, yet (Blaisdell, 2016, p.1)?'*

The directness of manner and speech that characterizes this question reflects in a striking way Nene's proactive and practical approach, and her propensity to act upon the opportunity at hand. She acts upon the target which she has just set for herself, thus, Zhang et al's (2019) claim that 'proactive individuals have an action-oriented attitude toward work and life'(p.269) seems to fit her well. She seems to be, as her actions and reactions reflect, naturally endowed with the ability to interact effectively and the tendency to initiate and encourage meaningful change.

Nene's anticipatory move contrasts sharply the passive reactive attitude of Nnaemeka, as suggested by his answer:

*No, I have been thinking about it. I think it is better to tell him when I get home on leave (Blaisdell,2016, p.1).*

Nnaemeka's answer, that he has not yet written to Okeke (his father) about their marriage comes in a matter-of-fact way that is suggestive of passivity and intentional procrastination. Apparently, he has already predicted his father's response and decided to defer the inevitable confrontation with him until he goes to the village and talks to him in person. What further complicates the matter is that Okeke has just sent him a letter informing him that he has chosen a life partner for him. Nnaemeka enters a state that Kaur (2019) refers to as the '*MUM Effect*' (p. 18), which is stress created by a reluctance to communicate bad news. The word 'mum' originally describes the state of not revealing what one knows, and the reluctance and stress associated with the breaking of bad news, according to Sussman & Sproul (1999), results from the deliverer's anticipation of different responses the receiver might make, namely: defensiveness, disbelief, and emotional distress. Each of these responses entails a different way of handling. The source of Nnaemeka's panic, if we take Sussman & Sproul's point, is that he does not know which self-defense mechanism Okeke's resentment may activate.

It is worthwhile to mention that Nene's proactivity towards letting her in-laws into their happiness hinges on the premise that marriage is a universally celebrated occasion in which the couple rejoices with family and friends, and her naivety about the Ibo ways causes her to fail to comprehend why her in-laws should be an exception. When Nnaemeka tells her that Okeke will not bless their marriage, Nene only says:

*That's what you always say. But I don't believe anybody will be so unlike other people that they will be unhappy when their sons are engaged to marry (Blaisdell, 2016, p.2).*

Both Nnaemeka's submissiveness as disclosing a reactive mindset and Nene's assertiveness as reflecting a proactive mindset can be better explained as conscious cognitive choices rather than idiosyncratic reactions. The couple seems to differ in their awareness of and familiarity with the way things stack up. Nnaemeka analyses the situation more soundly as he is mindful of his father's rigid adherence to Ibo's traditional ways and of the unlikelihood of obtaining his father's approval on his union with Nene, and this awareness contributes to the feeling of impotence and helplessness.

Feeling helpless towards the whole situation, Nnaemeka decides to wait and see how things unfold when he meets Okeke, and then respond accordingly. Conversely, Nene, who has been described by Purcell (2013) as the cosmopolitan who has been raised in Lagos, and who has a diluted attachment to her ethnic heritage'(p. 84) barely knows the life and culture of her in-laws. Apart from that, the Ibo generally welcome strangers, and Okeke is fond of Nnaemeka. Nene's engagement excitement fills her with optimism and intensifies her appetite to take the initiative and stimulate her husband to action.

Not knowing of his son's engagement, Okeke writes a letter to tell him that he has chosen a god-fearing village girl for him:

*I have found a girl who will suit you admirably - Ugoye Nweke, the eldest daughter of our neighbor, Jacob Nweke. She has a proper Christian upbringing. When she stopped schooling some years ago, her father (a man of sound judgment) sent her to live in the house of a pastor where she has received all the training a wife could need. Her Sunday School teacher has told me that she reads her Bible very fluently (Blaisdell, 2016, p.2).*

Although Nene's issue has not yet been brought up between Okeke and Nnaemeka, the above message elegantly articulates that Okeke would certainly disapprove of and strongly react against Nnaemeka's choice of Nene. Normally, the choice of a spouse follows a mechanism within the social system through which respect for family traditions and religious affiliation should be shown, and that the choice of a wife for an Ibo is the duty and right of the father. Furthermore, an ideal wife, to Okeke, is the one who has been pulled out of school and left with no opportunities in life, and who, idealistically, has a strict Christian upbringing. Apparently, Nene meets none of these life-partner selection criteria.

Marriage prerequisites stipulated in Okeke's letter are in line with Casimir's (2018) statement about the Ibo marital customs:

In Ibo-land traditional marriage is only valid when two conditions are satisfied. First, it must be arranged by the parents of the admirer. Second, the woman wooed must belong to the same tribe as the suitor'(p.33).

The implication that arises from the excerpt above is that marriage is a purely social construct determined by tradition and culture in a way that promotes and preserves social stability, and that the love bond between the admirer and the wooed is largely overlooked. Typically, in the case of Nnaemeka and Nene, the voice of love is silenced, and marriage is seen as an occasion to show public allegiance to society, and in that sense, the short story's title, which states that marriage is a private affair, is rendered ironic.

Nene's adamant encouragement of Nnaemeka to share their happiness with Okeke leaves him no other option but to disclose the truth of Okeke's objection to her. It is a shock to Nene, and a disappointment to learn that she is not welcomed in her husband's family on account of being an outsider to the Ibo community. What is really sad is instead of reciprocating the sincerity with which she tries to reach out to them and her persistent encouragement of Nnaemeka to write to them, they are repudiating her offhand. Nothing, however, will unleash her wrath on her in-laws, or drive her to abandon her proactive positive mindset in favor of a momentary vengeful frame of mind. What she has just heard does not overwhelm her thinking and planning because she has something higher and more substantial to concentrate on. This aspect of her character typically displays a proactive attitude according to Covey (1989) who states that the essence of a proactive person is 'the ability to subordinate an impulse to a value. Also, Kim (2019) describes the proactive person as 'the one who is relatively unconstrained by situational forces ' (p. 230).

Nene has suppressed the sense of bitterness resulting from being degraded by Okeke's rejection and has presumably resisted the temptation to take the line of thought that she is independent of them in almost every aspect of her life, and she could just walk away from them without a backward glance. Instead, she chooses to deal with this challenge sagaciously because breaking off from them would only mean uprooting her husband from his family knowing the amount of love that binds him to them, as well as that the bigger picture she aspires to draw of her marriage comprises good relationship with her family-in-law. She just coolly ridicules the idea that the tribe one belongs to, should decide who to marry. In the narrator's words:

*In the cosmopolitan atmosphere of the city, it had always seemed to her something of a joke that a person's tribe could determine whom he married (Blaisdell, 2016, p. 2).*

The idea of the cosmopolitan atmosphere in which Nene has, throughout her life, been immersed, is further endorsed by Purcell's (2013)

description of her as '*the educated, urban, professional, detribalized, modern Nigerian woman*' (p. 85).

Perhaps, Purcell is also paying homage to cosmopolitanism, through his portrayal of Nene as an embodiment of cosmopolitan ideals: education, urban lifestyle, detachment from ethnic affiliation, and from traditional ways of life.

Nnaemeka softens Nene's zeal as regards writing to Okeke and she finally leaves the matter to his discretion: '*All right, honey, suit yourself. You know your father*' (Blaisdell, 2016, p. 2). This attitude of being simultaneously pleasantly assertive, and respectfully submissive is a major characteristic of Nene's interactions, as emphasized by Mboya (2019), who states that '*Nene is the confident, sensitive modern Nigerian woman who uses her quiet strength not to antagonize other characters but to get things done*'(p.17).

Among other things, the above discussion seems to highlight the hybrid identity of the Africans who have been in touch with the western culture; the couple follows the western way of personal independence and gets married, but concurrently seeks family consent and forgiveness '*I have come to ask for forgiveness* (Blaisdell, 2016, p. 3). Not only is Nnaemeka apologizing for rejecting his father's choice, but also for denying his father the right of choice for his son.

*...am engaged to marry another girl who has all of Ugoye's good qualities... 'She is a good Christian,' 'You will change your mind, Father, when you know Nene* (Blaisdell, 2016, p. 3).

In his keenness to resolve the conflict with Okeke, or at least, narrow the gulf, Nnaemeka validates his father's criterion of religious commitment as a choice principle by arguing that Nene is as good a Christian as Ugoye (the girl chosen by his father). This point may also suggest that the young generation has not completely broken away from the whole set of values adopted by their traditional societies. In the following dialogue, Nnaemeka tries to present Nene to his father as a good choice according to his (Okeke) standards:

*The debate gradually sparks the outrage of Okeke. Nnaemeka has denied him his fatherly duty to arrange his own son's marriage and has rejected the traditional ethnicity-based choice of spouse in favor of a love-based relationship. To Okeke, love matters very little in the selection of a wife: 'I don't love her.'*

*'Nobody said you did. Why should you?' he asked.*

*'Marriage today is different...'*

*'Look here, my son,' interrupted his father, 'nothing is different. What one looks for in a wife are a good character and a Christian background'. Blaisdell, 2016, p. 3).*

To give Nene merit over Ugoye, Nnaemeka mentions to his father that she is a teacher as well, obviously thinking that this would promptly settle the competition in favor of Nene. However, what he has said only further subverts Okeke's expectations. Women teachers are especially condemned in Okeke's religious doctrine as they violate the exhortation of the Bible that a woman should keep silent:

*' St. Paul, in his letter to the Corinthians says that women should keep silent (Blaisdell2016, p. 3).*

The dispute between Okeke and Nnaemeka reaches the most provocative moment when the former demands to know whose daughter Nene is and learns that she is neither from the village nor an Ibo. Marrying from outside the clan breaches the customary rules of the Ibo tribe and is taken by Okeke as personally insulting to him as a father, and consequently, he ends the debate and later disowns his son.

This situation creates in Naemeka a feeling of utter helplessness. His father is very committed to his ideas about marriage and his conviction prevents any argument to be accepted if it contradicts his beliefs. At the same time, he cannot free himself from the feeling of guilt and anxiety caused by letting his father down. Deep inside, Nnaemeka does not consider himself as being ungrateful by refusing to heed his father's wish. He is quite convinced that he has just exercised his right of choice, yet he must, submissively, pay for his affront and accept his father's verdict of disownment.

The above debate between Nnaemeka and Okeke which reflects two irreconcilable perspectives, and probably inconsistent values with respect to the choice of a wife, reveals, among other things, that the elites who abandon their indigenous values in favor of modern western ways put themselves in direct conflict with the dominant cultural power, and to handle the resulting double identity or to seek reconciliation, they need to maintain a thin thread of communication with the society through the adoption of flexible strategies and restraints that reflect them as reasonable and less extreme in their views, vacillating between taking initiatives to promote newly acquired values and conceding to traditional societal expectations. Clearly, Nnaemeka has been given an ultimatum of either breaking up with his fiancé or breaking away from his commitment to his traditional society. To him, both cannot be dispensed with, so he endeavors persistently to narrow the divergence of views and make ends meet.

Later, Nnaemeka formally marries Nene despite his father's objection, and sends him, most likely upon the insistence of Nene, the wedding photo. Infuriated, Okeke obliterates Nene's side of the photo and returns the side featuring his son, with a message saying that he is no longer interested in them: *It amazes me that you could be so unfeeling as to send me your wedding picture. I would have sent it back. But on further thought, I decided just to cut*

*off your wife and send it back to you because I have nothing to do with her. How I wish that I had nothing to do with you either (Blaisdell, 2016, p. 5).*

Seeing her side of the photo mutilated, and reading the scolding message, Nene could not help but burst into tears. She has been abused and psychologically injured by Okeke, both before and after their marriage. However, she still can surmount such difficult moments so long as she can lean on, and have solace in her husband who, she believes will always comfort her soul and usher her through the most critical moments. Nnaemeka assures Nene that his father is good-hearted and will soon rectify his decision.

*Don't cry, my darling,' said her husband. 'He is essentially good-natured and will one day look more kindly on our marriage' (Blaisdell, 2016, p. 5).*

Interestingly, the couple seems to cancel each other's debt when, at one point of time, each is exposed to a moment of stress caused by Okeke's manipulative intrusive behavior and each is soothed and comforted by the other. Before involving Okeke in the issue of their engagement, Nene, proactively, tells Nnaemeka not to feel uneasy about his father's expected antagonistic reaction against their marriage plan as she knows Okeke to be too fond of Nnaemeka to harbor a grudge against him:

*'But anyway, as your father is so fond of you, I'm sure he will forgive you soon enough. Come on then, be a god boy and send him' (Blaisdell, 2016, p. 2).*

Nnaemeka's reactivity is suggested by his soothing of Nene after she has been hurt by Okeke's insulting demeanor, while Nene precociously comforts Nnaemeka when he anticipates an uncompromising reaction against their marriage from Okeke. Anyway, Nene does not let the unpleasant behavior of Okeke sway her from her goal of life. She picks the ray of hope given to her and goes on with her proactive endeavors towards assimilation.

Okeke is not the only one to boycott Nnaemeka/ Nene's connection. Other Ibo villagers denounce it and take a hardline stance on what they see as an unprecedented autonomous marital choice. Okeke thinks it is the work of the devil *'it is Satan's work'* (Blaisdell, 2016, p. 4), an old man proposes a theological interpretation *'Sons shall rise against their Fathers; it is there in the Holy Book.'*(Blaisdell, 2016, p. 4), and another suggests a medical diagnosis *'the boy's mind is diseased and only a good herbalist can bring him back to his right senses'*( Blaisdell, 2016, p. 5). Okeke disregards all the proposals and makes up his decision not to have Nnaemeka and Nene around him anymore.

Rather than nursing the feeling of being ostracized and not worthy of being included, or desperately waiting for Okeke's will to bend, Nene goes on with her incessant endeavors to bring about positive change in her situation and environment, a typical proactive behavior as per the definitions provided

at the onset of the study. She turns her attention to the Ibo community in the city of Lagos and establishes interaction, which later develops into intimacy with them. The Lagos Ibo women treat her in an exaggeratedly nice way suggestive of distancing and discontent rather than of sincere heartfelt welcoming.

*The prejudice against Nnaemeka's marriage was not confined to his little village. In Lagos, especially among the people who worked there, it showed itself in a different way. Their women, when they met at their village meeting, were not hostile to Nene. Rather, they paid her such excessive deference as to make her feel she was not one of them' (Blaisdell, 2016, p. 6).*

The more lenient and accommodative mind with which the city Ibo community receives Nene as contrasted with their village folks is probably attributable to the former's possession of a glimpse of cosmopolitan spirit in which diversity is acknowledged. Mboya (2019) claims that '*in 'Marriage is a Private Affair' exclusivist ethnicity is domiciled in the country while cosmopolitanism is domiciled in the city'*(p. 14). The city Ibo community does not reject Nene in the same forthright way their village counterparts do. By virtue of being city dwellers, they seem to have been influenced by what Leung, Koh, and Tam (2015) call the '*cosmopolitan orientation'* (p.79), which, according to them, includes '*respect for cultural diversity* (p.79), of which, values of tolerance and respect among different co-existing ethnicities are key elements.

Having proactively intruded on the Lagos city Ibo who has lukewarmly accepted her, provides a precious chance for Nene to prove to them her worthiness of their son. Engaging reactively with social dimensions in her situation seems to be more likely to generate positive results than assuming a proactive mindset. She dexterously reacts to the Ibo community's expectations, projecting the prototype image of a perfect house-wife as portrayed in Akanle et al's (2014) statement that '*Major incentives for marriage and family life are cohabitation, companionship, control economics and regular coital relationships for both procreation and pleasure* (p. 411).

Nene, as the Lagos Ibo women testify, has cultivated commitment, peace, and love in her family and she and her husband live as the happiest couple ever existed, as well as she has given birth to two sons whose love, when Okeke knows of their existence, supersedes his anger with her.

Unenthusiastically, the Ibo women confess that as a wife, Nene outperforms most of them:

*Slowly and grudgingly, they began to admit that she kept her home much better than most of them. The story eventually got to the little village in the heart of the Ibo country that Nnaemeka and his young wife were a most happy couple (Blaisdell, 2016, p. 6).*

It appears from this quotation and the quotation before it that Nene has lived up to the expectations of her host community and has set an exemplary model for what Connellan (2016) refers to as '*the cult of domesticity*' (p.1) which is a celebration of the mother figure and the roles of homemaking and nurturing.

This well-deserved praise draws a new image of Nene among the city Ibo community members, which has repercussions on the core of the Ibo region. According to Mboya(2019) Nene has achieved success within the new Ibo cultural identity reproduced in the city atmosphere. Deducing from this point Mboya postulates that Achebe is probably hinting at the possibility of framing a pan-African identity.

The success Nene achieves in penetrating the cosmopolitan Ibo society tempts her to venture to write to Okeke again. She now has a bundle of joy for Okeke, as she has given birth to two boys who will renew his life and continue his family lineage:

*Our two sons, from the day they learnt that they have a grandfather, have insisted on being taken to him. I find it impossible to tell them that you will not see them. I implore you to allow Nnaemeka to bring them home for a short time during his leave next month. I shall remain here in Lagos....' (Blaisdell, 2016, p. 6).*

Knowing from Nene's letter of the existence of two grandchildren of his, Okeke undergoes turmoil inside him and a drastic change of attitude towards Nnaemeka and Nene. He realizes that by boycotting their marriage, he has done nothing more than deprive himself of his son and his family all these years.

*That night he hardly slept from remorse, and ---and a vague fear that he might die without making it up to them' (Blaisdell, 2016, p. 7).*

Okeke's will is bending despite him being resilient, now that he is old enough to be obsessed with the idea of death, and that he might not have time to see his grandsons. The story ends with Okeke feeling perturbed and having a sleepless night during which he sees, in his mind's eye, his two forsaken grandsons outside in the harsh weather, beaten by the torrents of heavy rain. He wonders how he could shut his door against them.

*By a curious mental process, he imagined them standing, sad and forsaken, under the harsh angry weather - shut out from his house. die without making it up to them (Blaisdell, 2016, p. 7).*

Due to her meticulousness, capabilities, and the fairness of her cause, Nene's efforts finally pay off and she is, probably, fully accepted in the Ibo community.

The present study views Nene as a social change agent. She motivates and inspires change in the community through practical action. She possesses the skills and mindset of a social leader taking initiative, communicating effectively, collaborating productively as well as having a sense of commitment to life-long goals.

Upon her engagement to Nnaemeka, Nene initiates a dialogue with him prompting allegiance to her family-in-law. It does not occur to her that she will be unwelcomed by her groom's father on account of being an outsider and that she will, fundamentally, be at odds with the prejudicial social norms of the Ibo community.

Detecting her actions and reactions throughout her contact with the Ibo community, one notices that Nene acts proactively at times and reactively at others. She seems to act on the spur of the moment as every single situation she encounters may require a different way of handling it. For instance, she acts proactively by initiating earnest dialogue with her procrastinating soon to be her husband. As has been mentioned earlier in this study, her proactivity towards letting her in-laws into their happiness hinges on the universally held idea that marriage celebration is a joyous occasion not for the couple only but also for family and friends. She encourages her soon to be her husband to communicate their plan to his father assuring him that his father's fondness for him would not allow any room for permanent grudges against them when they finally get married. She also acts assertively by personally approaching the strenuously disapproving Okeke more than once. Okeke's disapproval shuts the door to the Ibo community in her face, but she, unrelentingly, turns to the other side and tries to find access through the window; she turns to the more open-minded cosmopolitan Ibo community with whom she has the shared experience of being a city dweller, and with whom she takes part in the enhancement of a new more tolerant Ibo identity. She also acts preemptively by surmounting, in many instances, moments of desperation and failure and by subordinating the fleeting impulses she sometimes experiences to higher goals of life.

Concomitantly, one should not lose sight of her totally different attitude when she indulges in the Ibo social life. She drops the proactive approach and dexterously reacts to the Ibo community's expectations, projecting the stereotype of a housewife, cultivating commitment, peace, and love, and carrying out the roles of homemaking and nurturing, as well as demonstrating allegiance to her husband and his extended family in an exemplary way. Most importantly, she has answered Okeke's dream by giving birth to two of his grandsons, whose love in his heart supersedes the anger,

which has been holding him back from recognizing Nene as a daughter-in-law for so long.

Drawing upon the critiques of the concepts of proactivity and reactivity, and having in mind Banks' (1999) claim, though in a slightly different context, that social change process may require social workers to react to practices that are perceived as unjust or ineffective, it would be feasible to claim that despite all Nene's proactive practices, only after going some way towards the traditional position and reacting positively to socially-imposed patterns i.e. fulfilling the local society's expectations as regards the cult of domesticity referred to earlier, Nene is finally accepted in the Ibo society.

Two important themes that seem to emerge strongly in the ups and downs of Nnaemeka's Nene's union are that marriage is a tribal matter that should be framed within allegiance and respect for family traditions and religious affiliation, and that family can tackle any threat so long as its members stand as one strong front against any external adversary force. However, these two themes fall outside the scope of the present study, and therefore will, hopefully, be dealt with in subsequent research.

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## The Greek Merchants of Moschopolis

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### Abstract

Moschopolitans, the residents of Moschopolis, enjoyed remarkable economic growth and prosperity. The first written records, referring to this shift and proving the commercial presence of Moschopolitans in Venice, have already appeared in the 16th century and consist mainly of correspondence. Exports of processed and unprocessed wool and the development of commercial contacts with markets of Venice constitute proof of the developed livestock in the studied area, which soon led to surplus products and the need for migration in search of new markets. So, a mountainous enclave was formed. The fabric was produced and exported to foreign markets and contributed to the initial formation of the “Industrial Revolution” in the Turkish-occupied country. Gradually, small domestic industries became the most important economic factor of the mountainous area throughout the 18<sup>th</sup> and 19<sup>th</sup> centuries. The article studies the trade relations of Moschopolitans with the ports of Venice, Dyrrachium (Durrës) and Ragusa (Dubrovnik), through the commercial correspondence, the role of the Venetian consul (bailo) in Dyrrachium, Moschopolitans relations with the authorities of Constantinople and Dyrrachium and how and why they gradually withdrew from the markets of Venice.

**Keywords:** Moschopolitans, Moschopolis, Vlachs, commerce, Greek merchants

## Introduction

The political and economic situation prevalent in the 16th century in the developed financial centres of Europe and the Ottoman-occupied Balkan countryside made the ports of the Adriatic the focal point of trade, dominated by the port of Venice. The trade contacts with the monetary economy of western Europe's cities portrayed the transition into a new era, for the traders operating under the Sultan and for their societies. It is worth noting that the movement of goods towards Venice, Ancona, and Messina during that period was mainly conducted through the ports of Dyrrachium (Durrës) and Ragusa (Dubrovnik). Trading houses were set up in the abovementioned areas, and agents were appointed. The people of Moschopolis had their own role to play within this financial system and developed key contacts with the Republic of San Marco. They were linked via the ports of Dyrrachium and Avlona (Valona) (Faroqhi, 2006; Bérard, 1893; Luca, 2011). Trade relations between Greece (Greci di Venezia) and the Most Serene Republic (Serenissima Repubblica Veneta) dated back to the period when Venice was a province of the Byzantine Empire (Maltezou, 1999).

The Treaty of Passarowitz in 1718 heralded the gradual economic and commercial decline of the Venetian state since it signified a transfer of commercial activity to the land routes of the Balkans and central Europe (Noradounghian, 1897; Bianchi, 1719; Lane, 1973). Furthermore, the great geographical discoveries, which caused the shift of the commercial interest focus from the Mediterranean to the Atlantic, the renewed French capitulations, the favourable arrangements reached by the English and Dutch with the Ottoman Empire, and, of course, the development of the neighbouring ports of Ancona, Livorno, Fiume (Rijeka) and Trieste (Luzzatto, 1954; McNeil, 1974; Katsiardi-Hering, 1986), following the positive changes made by Charles VI and his successors, primarily affected the commercial power of the once-dominant Serenissima (Bur, 1978; Katsiardi-Hering, 1996; Panova, 1985; Paskaleva, 1988; 1985; Ingrao, 1994; Gross, 1973; Anderson, 1966; Kellenbenz, 1976). Moreover, its constant warfare with the Ottoman army, its inability to modernise its commercial fleet and develop its shipbuilding technology, and its characteristic unwillingness to take part in the political and war-related events in Europe, by continuously adopting a neutral stand, brought about a gradual weakening of its power and its ultimate decline (Lane, 1987; Dudan, 1938).

It would be wrong if the intense conservatism displayed by Venice were also not taken into account, in addition to the above, which expressed itself through its strong persistence to maintain its old, outdated structures, which may have stemmed from its glorious past, but nevertheless did not allow it to answer to the demands of the new era. The state's rigid interventionism in the city's economic and political life and its anachronistic political system

were not able to keep up with the historical events of the early 18<sup>th</sup> century (Caizzi, 1965; Sella, 1961; 1968; Rapp, 1976; McNeill, 1974; Bernardy, 1902; Cernovodeanu, 1967; Lane, 1973). Finally, it should be noted that Venetian technology, regarding the production of textiles and bare essentials, had come to a standstill. Not only was it not able to follow the latest technological progress, which other European countries enjoyed, but it also did not succeed in satisfying the demands of the mass market. Instead, it supplied the market with second-rate intentionally overpriced products (Sella, 1968).

### ***The Greek merchants in Venice: 17<sup>th</sup> - 18<sup>th</sup> century***

The historical changes in Venice were certain to affect the Greeks living and working in the city. An indicative example that while in the early 18<sup>th</sup> century, the merchant class numbered approximately 400 families, in the mid 18<sup>th</sup> century, their numbers had dropped to only 70 (Xanthopoulou-Kyriakou, 1978). The occupation of Venice by the French forces in 1797 simply sealed the impending decline while also dealing a decisive blow to the Greek Brotherhood (Confraternita dei Greci) (Manousakas, 1989; Maltezou, 1999). Napoleon appropriated all the funds deposited in the banks of Venice, including the business capital of its Greeks residents, and the funds owned by the Brotherhood, thus creating acute problems affecting the survival of numerous families and institutions founded by the diaspora (Xanthopoulou-Kyriakou, 1978; Manousakas, 1973; Maltezou 2008). The established “Municipalità Democratica” which replaced the previous regime, was short-lived, since a few months later, in October 1797, the Venetian hinterland (Terra Ferma) fell into the hands of the Habsburgs after the signing of the Treaty of Campoformio (Bernardy, 1902; Papaioannou, 1986; Hatzopoulos, 2002).

The Greek merchants referred to in Venetian sources as *commercianti*, *sensali*, and *negozianti* (Xanthopoulou-Kyriakou, 1978), developed large-scale activities in the city of San Marco in the last decades of the 17<sup>th</sup> and early 18<sup>th</sup> century, even though the port of Venice was no longer dominant in transit trade (Sella, 1961; Maximos, 1944). Several successful trading houses were operating in the city at the time. At the same time, Greek ship-owners, due to their small sailboats and low fares, were able to navigate the coastline of the Ionian Sea and the Adriatic and take advantage of the increased demand for products from the Turkish-occupied Balkans, such as wool, cotton, and leather. Within this political-economic climate, the merchants of Moschopolis appeared in the markets of Venice in the 17<sup>th</sup> century.

### **Moschopolitans in Venice**

Since the trade relations between the Moschopolitans and Venice were thus conducted within a pre-established framework of trade operations

between the Greeks and the Italian state, which dated back several centuries, this meant that the merchants of Moschopolis came across a fully organised and wealthy Greek community (nazione greca), which assisted them greatly from an economic and social perspective. The significant volume of trade that connected Moschopolis with the markets of the Serenissima can be clearly seen in the correspondence of the Venetian consul (bailo) in Dyrrachium. In 1957, the work of Martinianos, the Metropolitan of Xanthi, on the history of Moschopolis was published. When referring to the trade relations of the Moschopolitans with Venice, the author extensively relied on the monograph of Valeriu Papahagi *Aromânii Moscopoleni și comerțul Venetian în secolele al XVII-lea și al XVIII-lea*, which had been published in Bucharest in 1935, and on two articles by the same author that had been translated into Greek and were published in 1934 and 1935 in the magazine *Ipirotika Chronika*.

It is an undisputed fact that the publishing efforts of Papahagi were of significant significance and highly enlightening as regards the presence of the merchants of Moschopolis in Venice. It is also, however, a fact that his Romanian origin did not allow him on several occasions to objectively view the Moschopolitans as descendants of the Vlachs but rather as Romanians (Popović, 1937; Papahagi, 1935; 1939). Despite any such weaknesses, however, Papahagi seems to have ultimately achieved his goal, which was to show, as noted in the first pages of his books, through certain letters sent by Moschopolitan traders and consuls in the Serenissima Repubblica, how the merchants of Moschopolis presented themselves to the people of Venice, their relations with the Venetian authorities of Constantinople and Dyrrachium, the goods traded by them on both sides of the Adriatic and how and why they gradually withdrew from the markets of Venice (Papahagi, 1935).

Martinianos noted thus that in Papahagi's monograph, he found 23 letters of commercial interest, written in the Greek language, which belonged to various Moschopolitans and were kept in the "Documenti Greci" collection of the State Archives of Venice (Archivio di stato di Venezia). Three more letters by Moschopolitans, also written in Greek, were found in the "Carte Greche" file, which also included the correspondence with the Venetian bailo in Constantinople, the complete correspondence of the Glykides family from Ioannina, and, finally, several letters written by the Venetian consuls in Dyrrachium, who maintained contact both with their city and with the bailo of Constantinople. These documents prove beyond doubt the extensive trade relations developed between Moschopolis and Venice, mention the names and undertakings of numerous Moschopolitan merchants, and also provide a wealth of information on the kind of wares they traded-in.

Through the consular reports (relazioni) of the Venetians in Dyrrachium, it is apparent that the term "marchands grecs de Moschopolis" was not only used to refer to the Moschopolitans but also included a large

number of Vlach- and Albanian-speaking merchants from neighbouring regions (Papahagi, 1935; Vacalopoulos, 1969). The first written report on Moschopolitan merchants can be found in the French Ministry of Foreign Affairs archives. More specifically, Comte, the French consul in Dyrrachium, in a letter to his country's Navy Minister, Count Pontchartrain, dated 8 February 1699, provided detailed information on the trade transactions between Venice and various regions of Macedonia, Epirus, and Albania. As described by the consul, about 100 Turkish and Greek (*turcs et grecs*) merchants settled in Shkodra, Elbasan, Moschopolis, Siatista, Ioannina, and Thessaloniki, who handled their trade with Venice through their respective agents (*tous de nation grecque*) located in the city.

Georgios Koumanos (Papastathis, 1999; Gavriliadi, 1988-1989; Papahagi, 1935; Luca, 2011), Kottonis, Stamatellos, Karagiannis, Ioannis Vellais, Michail Peroulis, Ioannis Ieronymos, and several others, all of Greek origin (*tous de nation grecque*), were just some of the agents living permanently in the Venetian Republic, who helped to establish trade relations with the afore-mentioned regions. According to Comte, 3,000 quintals of wax each year, 1,500 quintals of top quality processed wool (*laine fine*), leather from Córdoba (*cordouans*), and silk all left the port of Dyrrachium for Venice. Imports from Venice included 1,500 pieces of Venetian wool felt of exceptional quality and 300 pieces of *loundres*. Comte also noted that the goods as mentioned above were usually transported by English, Dutch and French ships, not only from the port of Dyrrachium but also from the port of Ragusa (Martinianos, 1957; Papahagi, 1934; Kilipiris, 1999; Ruffini, 1942; Carter, 1972).

### **The consular reports of the Venetians**

The correspondence of the Venetian consuls in Dyrrachium is a precious source of information that substantiates the extensive trade developed between Moschopolis and the markets of Serenissima (Papahagi, 1934; 1935). In the letters exchanged between the Venetian consuls in Dyrrachium, the bailo of Constantinople, and the Cinque Savi of Venice (*Cinque Savi alla Mercanzia*), who were in charge of trade, frequent references are made to the merchants of Moschopolis (Martinianos, 1957; Papahagi, 1934; Kilipiris, 1999; Maltezou, 1970). The Venetian consul in Dyrrachium, who was entrusted with serving the interests of Venetian trade throughout Albania, held the highest rank, followed by the bailo and the ambassador of Venice to Constantinople. The consul in Dyrrachium, due to his position and duties, was in very close contact with the merchants of Moschopolis and recommended the most trustworthy of them to the Venetian authorities in Constantinople, where they were received in the audience (Papahagi, 1935). An indicative example can be found in a letter sent by Pietro Rosa, the Venetian consul to

Dyrrachium, to the bailo Ascanio Justiniani in April 1706 through Ioannis Kostas Zoupan from Moschopolis; the latter was recommended as a reliable partner of the Venetian Republic, which explained why he was asked to deliver Rosa's letter to Justiniani (Papahagi, 1934).

The letters periodically exchanged between the Moschopolitans and the representatives of Serenissima serve to prove the solid commercial ties that joined the two cities and bring to light a range of problems and difficulties that the Moschopolitans faced in trading via the port of Dyrrachium. For example, in a letter dated 7 October 1706, through which the Christian merchants of Moschopolis and Siatista, together with the Muslim merchants of Elbasan, expressed their intense displeasure to Pietro Rosa about the fact that the Cinque Savi exempted the Turkish merchants of Shkodra (*mercanti turchi di Teranova*) from the 2% tax imposed on all other merchants. To avoid the cause of such complaints, the Venetian consul hastened to inform them that the traders of Shkodra were subject to the same terms and that if such an event had occurred, it was purely an omission. At the same time, in a letter to the Cinque Savi, he pointed out that he had made every possible effort to ensure that the merchants of Dyrrachium would use the ships of Venice and not of Dulcigno (*Dulcignoti*) (Papahagi, 1935; 1934; Kilipiris, 1999).

Pietro Rosa's efforts to further develop and strengthen the trade between his homeland and the regions of Macedonia, Epirus, and Albania, were primarily thwarted by the presence and actions of Nikolaos Poulimenos (*Nicolò Pulimeno*) from Ioannina. He was a man who defended the interests of the Dutch and managed to secure the post of secretary at the port of Dyrrachium, instead of Dimitris Triantafyllou, who the Venetian Republic supported. The hatred of Poulimenos towards the Venetians was so great that he did not hesitate to express his deep desire to witness yet another Turko-Venetian war unfolding. Furthermore, around 1705, he leaked so-called complaints to the merchants of Moschopolis from the people of Peloponnese against the Venetians, which were so grave according to Poulimenos, that they had even reached the Sublime Porte (Papahagi, 1935; Martinianos, 1957). What Nikolaos Poulimenos was aiming for, according to the Venetian consular reports, was to arrange for goods to be transported from Dyrrachium to Ancona, instead of Venice, by using ships from Dulcigno rather than Venetian ones (Papahagi, 1935). The merchants of Moschopolis and Siatista initially did not seem to acknowledge Poulimenos' post as a secretary at Dyrrachium port, the fact that Rosa tried to exploit at every given opportunity.

Thus, of particular importance is a letter, of which two copies have been found in Greek, and a translation into Italian, dated 26 June 1706, which means it was written two months after the afore-mentioned correspondence between Rosa and Justiniani. It is signed by eight merchants of Moschopolis and is addressed to Pietro Rosa, whom they inform about their extraordinary

commitment to the interests of Venice. More specifically, Georgios Giras (Jorghis Jira), Dimitris Georgiou (Dimitri di Jorghis), Simos Georgiou (Simo di Jorghis), Theodoros Adami Papas (Todori Adami Papa), Kostas Theodorou (Costa di Todoro), Georgios Theodorou (Jorghis di Todoro), Antonios Giras (Antoni di Jira) and Adamis Georgiou Giras (Adami di Jorghis Jira) contacted the consul of Venice. They expressed their desire to store their wares at his warehouses only while also designating Adam Giras as their proxy, who would travel to Dyrrachium to discuss these matters with him (Papahagi, 1935; Martinianos, 1957).

Nevertheless, for a brief period, Poulimenos managed to persuade two merchants from Moschopolis, Ioannis Evangelou Papas and Dimitrios Bizoukas, to conduct their business using ships from Dulcigno (Papahagi, 1935; Martinianos, 1957). The Dulcignians ignored the relevant prohibitions stated in the Treaty of Karlowitz and built their own ships, which they claimed to use only to conduct their own trade; in reality, however, they were used for piracy. Their actions caught the attention of Francois Pouqueville, who, during a journey around Albania, had noted the plundering frenzy of the approximately 6000 inhabitants of Dulcigno; he also pointed out the imperative need for the Dalmatian authorities, which governed the region, to take immediate measures to vanquish such elements (Martinianos, 1957).

### ***The Dulcignians at the port of Dyrrachium: a significant problem for Venetians***

The people of Dulcigno (Papahagi, 1935) were a significant problem for Pietro Rosa in general, as noted in all the letters sent by the latter to Venice and Constantinople, in which he provides a detailed description of the countless problems caused by the actions of the Dulcignian pirates. In February 1709, Rosa sent a trusted Moschopolitan merchant, Ioannis Georgiou Papas (Gianni Giorgio Papa), to the bailo of Constantinople, Alvise Mocenigo, to inform him about the unrest at the port of Dyrrachium and the tens of problems and misunderstandings being created by all the parties involved. However, the situation seems to have become even more complex due to the Russian-Turkish war of 1710. In a letter sent by Pietro Rosa to the Cinque Savi of Venice on 18 January of the following year, the beylerbeyi of Roumeli was ordered to march through the whole extent of his territory and even attack parts of the Adriatic coast.

Relevant information about the prevalent conditions at the time can be found in the various letters exchanged between Ioannis Nerantzis, a merchant from Siatista who lived permanently in Dyrrachium, and Dimitrios Vizoukas, a merchant born and residing in Moschopolis. They describe a dire situation involving the arrests of various *prokritoi* (regional leaders) who were considered suspects and armed gangs of thieves that plundered the regions of

Macedonia, Epirus and Albania, leaving hundreds of people at the mercy of their vindictive vengeance. These gangs even reached the suburbs of Moschopolis and threatened the Monastery of Saint Naum in Ohrid (Papahagi, 1935; 1934; Martinianos, 1957, Kilipiris, 1999).

The Moschopolitans' contact with Pietro Rosa continued on perfect terms over the next few years. Subsequently, the Venetian consul would constantly recommend the merchants of Moschopolis to the bailo in office, and the correspondence between Dyrrachium and Constantinople was conducted via Moschopolis. Thus, after Georgios Vretos, Rosa used the exact words of praise to recommend Michail Georgiou (Micali Giorgio) to bailo Zouane Emo in 1720, then Adam Giras (Adamo Gira), Chatzis Michail Simos (Cazì Micali Simo), and Michail Sideris (Micali Sideri) to bailo Francis in 1725 and, finally, Adam Giras (Adamo Gira) to bailo Dolfin in 1728; Adam Giras conflicted with his fellowmen, but conducted a significant volume of trade from Moschopolis to Venice (Papahagi, 1935; 1934; 1939; Martinianos, 1957).

### ***Moschopolitans being thwarted by the actions of the Dulcignians***

In the meantime, the commercial activities of the Moschopolitans, and the others trading from the port of Dyrrachium, were still being thwarted by the actions of the Dulcignians. Due to this, in the year 1720, the consuls of Venice, England, France, and Holland in Dyrrachium all pointed out that it was unacceptable to allow a rowdy gang of thieves to inconvenience the merchants of Moschopolis, Siatista, Ohrid, and Monastir, who played a decisive role in the commercial and economic progress of Dyrrachium (Papahagi, 1934; Martinianos, 1957; Laios, 1982). However, from 1720 onwards, more and more Moschopolitan merchants began to view the Venetian trade networks of Dyrrachium with a degree of suspicion. They turned their attention towards the shipowners of Dulcigno.

The Venetian consul in Dyrrachium did his utmost to restrict the entrance of Dulcignian ships into the port and the signing of trade agreements with Greek merchants; he also frequently intervened with the Cinque Savi to settle misunderstandings and tense episodes that occurred from time to time. More specifically, he tried to resolve any conflict or problem affecting the Moschopolitan merchants, as he noted clearly in late April 1720, since he had to keep them away from any agreements with the people of Dulcigno. This explains why, when captain Steffano Tripcovich, who supported the interests of Venice, refused to make the discount he had initially promised for the transfer of tobacco parcels and came into conflict with Michail Simou Georgiou (Micali Simo Giorgio), the Moschopolis merchant, and his partners, Rosa reassured them that he would narrate the facts to the Cinque Savi and they would make sure that justice was done (Papahagi, 1935).

Nevertheless, despite the keen efforts of Pietro Rosa, the number of Moschopolitans making agreements for the transportation of their goods with captains from Ragusa and Dulcigno was on the rise. The anxious letters sent by Rosa to the Cinque Savi alla Mercanzia indicate the prevailing conditions. In May of the same year, more merchants from Moschopolis, namely Georgios Vretos (Giorgio Vretto) and Dimitris Vizoukas (Dimitri Visucha), as well as Georgios Nikolaou (Giorgio Nicola) from Verati, all signed an agreement with the French representative in Dyrrachium. They chartered a ship from Ragusa to transport their goods. It is worth noting that Georgios Vretos is the same person who, a few years earlier, had been recommended to the bailo of Constantinople by Rosa for the post of the interpreter at the Venetian consul in Dyrrachium, since he was considered a trusted person who supported the interests of the *Serenissima*. After his contact with the French consul, Vretos decided to distance himself from the Venetians and tried persistently to persuade other merchants from Moschopolis to follow suit and sign agreements with the Dulcignians.

According to Rosa, this sudden change of mind by Vretos was due to his displeasure at the result of his conflict with his recent partner, Nerantzis. By joint agreement, their case was referred to a team of four “arbitrators,” which consisted of the Moschopolitan merchants Adam Giras (Adamo Gira) and Michail Simou (Micali Simo), Avraam Levi (Abram Levi), a Jew from Ragusa, and Pietro Rosa. In the end, the committee ruled in favour of Nerantzis, and Vretos was asked to pay him a fine of 90,000 akçes (Papahagi, 1935; Martinianos, 1957). A year later, another Moschopolitan merchant, Ioannis Sigkounas (Joanni Siguna), agreed with shipowners from Dulcigno to transport of Venetian textiles (Papahagi, 1935; Martinianos, 1957).

### **Moschopolitan merchants’ commercial practices in Venice**

Apart from what has been noted above, the correspondence between the merchants of Moschopolis and the representatives of Venice also provides the opportunity to shed light on several parameters of the commercial practices and conduct adopted and followed by the merchants of Moschopolis. These parameters are related to how they were organised, the establishment of cooperatives and the development of their trade-business networks. Commercial goods, names of Moschopolitan merchants, partnerships with family members, fellow citizens, and people from neighbouring areas, tension, arguments, and problems are all depicted in the pages of these letters while also providing a glimpse into the particular climate of that period that considered the values of trust and solidarity as essential to the pursuit of commercial activities.

Venetian records provide us with the names of numerous Moschopolitan merchants. Some of the best-known families of traders are

Bendos, Sideris, Zoupan, Vizoukas, Papas, Vretos, and Sigkounas (Papahagi, 1935), while the most populous traders' family in the city were the Giras since almost all its members had formed essential trade relations with Venice, according to Rosa (Papahagi, 1935). Nikolaos Theodorou (Nicola Theodoro), Dimitrios Konstantinou Bendou (Dimitrie al lui Bendu), Georgios Papas (Georgio Papa), Georgios Theodorou (Georgio Theodoro), Ioannis Georgiou (Gianni Gheorgiu), Nikolaos Stavrou (Nicolò Stavro) are considered to be among the first Moschopolitans to develop economic activities in Venice (Papahagi, 1935; Martinianos, 1957). More specifically, letters from that period often include the names Adam Giras (Adam Jira), Antonios Giras (Antoni Jira), Georgios Giras (Jorghis Jira), Michail Giras (Michali Jira), Dimitrios Georgiou (Dimitrio Gheorgiu), Simos Georgiou (Simo Gheorgiu), Kostas Theodorou (Costa Theodoro), Georgios Theodorou (Georgio Theodoro), Lazaros Georgiou (Lazaro Georgio), Dimitrios Theodorou (Dimitrio Teodoro), Georgios Michalis (Giorgio Micali), Ioannis Manolis (Zuanne Manoli) and Georgios Manolis (Giorgio Manoli ) (Papahagi, 1935; 1939; Mertzios, 1947; Martinianos, 1957).

Trade was usually conducted through cooperatives, whose members often included residents of neighbouring settlements to Moschopolis. One such example is the cooperative companies that the Moschopolitans established with several merchants from Siatista. Another such case is the partnership between Ioannis Georgiou Papas (Giovanni Giorgio Papa) and Dimitrios Vizoukas (Demetrio Bisuca) from Moschopolis, with Ioannis Nerantzis (Giovanni Neranzi) from Siatista, from 1705-1712. In a letter by Rosa, it is understood that following the death of the two Moschopolitans, their position in the company was taken over by their brothers, Nikolaos Papas (Nicola Papa) and Kostas Vizoukas (Costantin Bisuca), who continued their cooperative activities with Ioannis Nerantzis (Papahagi, 1935; Martinianos, 1957; Laios, 1982)<sup>44</sup>.

In a letter dated 1720, Pietro Rosa mentions that Georgios Vretos from Moschopolis set up a cooperative with Luigi Matteo, whose partners included certain Greeks and Turks, who transported goods to Venice (Papahagi, 1935). The sign "di ragione di Nicolo Cazi Michali da Siatista e compagni da Moschopoli per Fiume Trieste" referred to the cooperative company of Nikolaos Chatzis Michalis from Siatista, who sent packages of goods to Fiume and Trieste in 1741, in collaboration with Moschopolitan merchants, by chartering ships from Dulcigno (Martinianos, 1957; Kilipiris, 1999). In 1742, Dimitrios Theodorou and Lazaros Georgiou sent Ioannis Dimitriou, their permanent representative in Venice, 681 parcels of tobacco, weighing 32,112 okas and 114,336 lbs (Papahagi, 1935).

The cooperatives developed and flourished because of a network of emotional bonds. Thus, commercial networks were created that reflected the

mentality and ethos of the parties mentioned above while also shaping the required conditions and strategies for financial profit. In particular, as regards the society of Moschopolis and the prosperity it enjoyed, the influx of large amounts of capital in the surrounding area proved that the flow of money into the city entirely depended on the networks established by members of the merchant class. Many letters show the ties that developed between the merchants. The young people who were sent to train with a great merchant or representative had to abide by what he said for a certain period and serve as apprentices to be taught tricks of the trade. Finally, the correspondence between the merchants of Moschopolis also shows that they avoided writing about specific issues in their letters, choosing instead to use trusted individuals to deliver the messages in person.

The port of Dyrrachium was the most important port linking the Moschopolitans to Venice. That is why Moschopolitans could also frequently be found in Avlona, where their stores and warehouses (Vacalopoulos, 1992; 2003). In addition, as noted in the letters, the Moschopolitans also used other ports along the Adriatic coast, such as Castelnuovo, Perast, and Dobrota, which were part of “Venetian Albania” (Papahagi, 1935) and mainly served the trade from Venice. The Moschopolitans had also developed trade relations with Ancona apart from Venice. The characteristic phrase “per via di Ancona” shows the regular trade contact and collaboration between numerous Greek merchants and this large Adriatic port. Over time, it seems that trade relations were also established with the ports of Trieste and Fiume (Papahagi, 1935, Martinianos, 1957).

### ***Commercial goods handled by the merchants of Moschopolis***

The “manifesti di carico” and “viscontri di scarico” docked in Dyrrachium provide valuable and detailed information up to the year 1755 on the goods handled by the merchants of Moschopolis. The lists mentioned above show that large quantities of wool and leather, treated and untreated, were transported from Moschopolis to Venice. A detailed account of the goods exported from Dyrrachium would include wool, *ampades* (capoes), *tserges* (rugs), *velentzes* (carpets), yarns, *sahtiania* (processed goatskin), *maroquins*, cloaks, coats, bed linen, carpets of varying quality, from very thick to very thin, in many different colours and of exceptional quality, sheepskin treated with varnish and unprocessed sheep and calfskins, coffee, saffron, tobacco, and wax (Papahagi, 1935, Martinianos, 1957; Mertziotis, 1947; 1936; Luca, 2004).

Venice supplied the markets of Moschopolis with felt, velvet (Beaujour, 1829), gold-woven fabric, silk, taffeta, londrins (Beaujour, 1829), scarves, kaftans, gold decorative braids, different types of fabric (Beaujour, 1829; Papadopoulos, 1989) and clothing, of varying quality, since they were

required to cover the ever-increasing but also diverse needs of the East. Imports also included glass items, glasses, carafes, bottles, many of which made at the workshops on Murano island, others made of beautifully crafted porcelain (an art originating from Majorca), pistols, cordons, products for dyeing and storing leather and fabric, iron wire, cosmetics, decorative items, mirrors (Dimitropoulos, 1996; Tenenti, 1959; Luzzatto, 1995; Brunello, 1981), lamps, rails, paper, books (Liata, 1977; Tsirpanlis, 1981), ink, pewter, sugar, coffee, nuts, crosses, chalices, chandeliers, iconostases, prayer books (Papahagi, 1935; Martinianos, 1957; Koltsidas, 1999).

Many other merchants from neighboring settlements to Moschopolis also actively exchanged trade between Dyrrachium and Venice. Furthermore, it would be wrong to think that the merchants mentioned above were only interested in establishing trade relations with Venice and the markets of Europe. Tens of merchants traveled to the small markets of Elbasan, Berat, Tirana, Kastoria, Mascholouri, Ellassona (Asdrachas, 1975), Larisa, and Thessaloniki to sell their wares, and also took part in the large annual trade fairs (Martinianos, 1957; Arsh, 1994; Vacalopoulos, 1992; Papahagi, 1939; Katsiardi-Hering, 2003; Karanatsis, 1994; Svoronos, 1996). Antonio Bartolovich, the consul of *Serenissima* in Dyrrachium, in a letter dated 8 February 1761, provides a detailed account of how the merchants arriving at the port had to travel through several regions to procure the products they exported to the Venetian Republic. For this reason, we find many of them transporting cotton from Serres, wool from Monastir and Skopje, silk (Sella, 1961; Cousinéry, 1831; Iglesi, 2004) from Thessaloniki, wax from Vlachia and Serbia, treated leather from Ohrid and sheepskin from Elbasan, Tirana and Berat (Papahagi, 1935; Martinianos, 1957). The correspondence of that period shows that the currency used for these transactions were the zecchini and ducats of Venice, the reals of Spain, and the akçes and grossi of the Ottoman Empire (Papahagi, 1935; Martinianos, 1957; Liata, 1996).

Cotton was undoubtedly one of the most important products exported from regions under Ottoman rule. The most significant quantities of cotton in the Ottoman Empire were gathered from the valleys of Serres and Smyrna. For the Moschopolitans and other merchants of Macedonia and Epirus, Serres and its surrounding villages became the most popular trading hub, which they regularly visited for their supplies in cotton. Cotton crops in the region reached such a level in the 18<sup>th</sup> century that they greatly exceeded wheat crops (Beaujour, 1800; Clarke, 1824; Vacalopoulos, 1976; Leontaritis, 1981). Different packaging methods were used on each occasion, depending on whether the cotton would be transported by land or sea. Its price also fluctuated depending on the demand and quantity on offer (Beaujour, 1800; Vacalopoulos, 1976; Iglesi, 2004). Cotton was not only considered essential

for the Venetians. The French, and mainly the Habsburgs, also acquired large quantities of cotton from the region of Serres.

The regions of Albania and Thessaly were at the heart of the wool production. Skoutari, Elbasan, the mountainous Vlach villages, Larisa, Trikala, as well as Giannitsa, Sofia, and Plovdiv were the most important centres for the show and collection of wool. The wool stood out for its quality and how it was processed. It was undoubtedly a staple for the demands of the rapidly expanding European textile industry, which was a well-known fact to the merchants of the Ottoman Empire that they tried to exploit in every possible way. Finally, to procure wax, the Moschopolitans traveled to several regions of Albania, frequently visited Bosnia, and even went as far as Vlachia, as can be seen in their correspondence (Papahagi, 1935; Martinianos, 1957; Papastathis, 1999; Mertzios, 1947).

Finally, the letters exchanged between the Moschopolitan merchants show that many of them arrived in the prosperous state of the Republic of San Marco not only to obtain or sell wares, teach their children the art of trade or settle there as commercial agents, but also because they were interested in coming into contact with the civilisation of the west, for study and education (Papahagi, 1935; 1937). Thus many of the Moschopolitans' children arrived in Venice and joined the classes of the Flanginian School; they were taught sciences and letters in the learning environment of the Serenissima and returned to their birthplace to convey their knowledge to their fellowmen. The best-known example is Ioannis Chalkeas from Moschopolis. They served twice as director of the Flanginian School and as a priest at the Greek church of St George (San Giorgio dei Greci) (Martinianos, 1957).

### **The Greek language and the Moschopoli's location**

A study of the letters published by Papahagi provides the opportunity to arrive at certain general conclusions regarding the presence and commercial activities of the Moschopolitans in Venice. What is depicted through the numerous letters is that the correspondence exchanged by the Venetian consuls never refers to Vlachs but always to Greek merchants from Moschopolis (Papahagi, 1935). The reason is obviously linked to the Moschopolitans always used the Greek language for their commercial transactions. There is no single Vlach word in their letters; however, several Italian ones are. What is also clear is that they always made proper use of the accents and breathings of the Greek language, and their spelling was very satisfactory given the circumstances at the time. The Vlach language was used only within their family environment, often in their own towns, but never for official trade agreements and transactions. After all, it should be noted that Venice already featured a rich and prosperous Greek community, which was

an element that rendered the use of the Greek language essential and particularly useful for those operating in the Serenissima.

The Moschopolitans' decision to use the Greek language for their transactions did not only refer to the trade contacts they developed in Venice. It was also used in the Balkans and Central Europe markets where they operated and, as expected, in the settlements they established. The Greek language was the essential tool for all economic agreements of the Vlach-speaking community since it was the official language of commerce for almost all merchants in the Turkish-occupied Balkan regions. This particular functional role of the Greek language (*lingua franca*) was precisely why the Moschopolitans chose to exclusively use Greek for their commercial transactions and contact with third parties (Stoianovich, 1960; Karakosta, 2011).

Moschopolis, as the place of origin of merchants, appears in the State Archives in various corrupt forms as Moscopolì, Moscopoli, Moscopolj, Moscopole, Voscopoli, Voscopolij, Voscopoli, Voscopolj. Moschopolitans appear as Moscopoliti, Moscopolit, Moscopolean, Muscopul'ian, mercanti moscopoliti, greci din Moscopole, certi mercanti greci di Moscopoli, I Greci di Moscopoli, mercanti greci da Voscopoli, mercanti greci di Moscopoli (Papahagi, 1935; Katsiardi-Hering, 2006; 1996; Vlami, 2000; Peyfuss, 1975).

On the Venetian consuls, a great wealth of information can be found in the letters of Pietro Rosa, Giambattista del Rossi, Francesco Cumano and Antonio Bartolovich. However, Pietro Rosa was the consul whose correspondence is the most dependable and complete in providing a detailed description of the Moschopolitan merchants. Through the texts of the Venetian consul, the latter are at times presented as being honest, loyal, and dedicated to the Republic of San Marco. Elsewhere they are characterized as being disloyal and dishonest, depending on the outcome of their trade transactions at the port of Dyrrachium and the prevalent conditions at the time. The fact that Rosa lived in Dyrrachium for many years allowed him to get to know the Moschopolitans very well, especially concerning their mentality, way of thinking, and the methods they used to link the two sides of the Adriatic through trade (Papahagi, 1935).

He did not hesitate to cooperate with them on issues relating to his country, as shown above. Thus, several Moschopolitans whom Rosa trusted to ensure the safe transfer of the correspondence sent by the Venetian authorities in Dyrrachium to Constantinople and vice versa. The route Dyrrachium-Moschopolis-Constantinople, which covers approximately 800 kilometres, seems to have been used quite regularly by caravans. The fact that Moschopolis was located mid-way along this route is clearly depicted in the phrase *per via di Moscopoli*. Within this framework, although the Moschopolitans were Ottoman subjects of the Sultan, they were introduced

and acted as loyal friends and partners of the Venetian Republic in the East. Although the fact that the Moschopolitans were viewed as trustworthy by the Venetian State meant that they enjoyed a certain prestige and value, as did their city, there is, however no doubt that they tried to exploit this trust to the utmost, to gain the most significant possible benefits from trading with the said Italian city (Papahagi, 1935).

### **The decline of commercial activities between Moschopolis and Venice**

From 1741, however, there is an increasing number of references stating that the Moschopolitan merchants were no longer considered the loyal and dedicated merchants of past years. Their collaboration with ships serving the economic interests of Ragusa had become more and more frequent, while several complaints were arriving at Dyrrachium about them forsaking the laws of trade and illegally importing a great many products (Papahagi, 1935). In 1755, Konstantinos Segkounas was the name of the last Moschopolitan merchant that appears in the letters exchanged between the Venetian consul in Dyrrachium and the Cinque Savi.

Another important observation, regarding the letters from that period, studied and published by Papahagi, is the fact that, in referring to their city, the rulers of Venetian did not only provide information related to the merchants but also frequently presented detailed accounts of the overall political and social situation in Albania. Thus, on 30 April 1711, we see Pietro Rosa informing the Cinque Savi alla Mercanzia about the turbulent situation in Macedonia and the Balkans due to the outbreak of the Russian-Turkish war. He comments on the plundering and destruction that the armed gangs were carrying out in the area of Monastir and Ohrid. At the same time, letters of similar content and interest are also found in the correspondence of 1736, when the next war broke out between the Czar and the Sultan (Papahagi, 1935).

This intention to provide a detailed account of the activities in the Turkish-occupied East, particularly in the Balkan hinterland, also explains the existence of a letter dated 1742, sent by consul Giambattista de Rossi to the governor-general of Dalmatia and Venetian Albania, Girolamo Querini. In the letter, he speaks of highly infectious disease, with symptoms similar to the plague or cholera, which had taken the lives of countless inhabitants of Elbasan, Dulcigno, Siatista, and Moschopolis. As regards Moschopolis in particular, the consul certainty notes that 200 people had died up to that point (Papahagi, 1935; Martinianos, 1957). In fact, the Codex of the Holy Monastery of Timios Prodromos in 1740 speaks of a “great famine” that affected the city and lasted from February to June. In August 1896, Martinianos mentions that he found a small 6-page leaflet in the library of the Holy Monastery of Simonos Petra on Athos, attached to an issue of the Liturgy

of St Naoum that had been conducted in Moschopolis in 1740. The sixth page had no writing but bore four images commonly found in the books published in Moschopolis, along with the stamp of the city's printing house. In the remaining five pages, famine had been mentioned that had affected Macedonia that year. There is an eloquent description of the dire situation faced by the city of Moschopolis and detailed records of how the food prices had risen (Martinianos, 1939).

## Conclusion

The correspondence continued undiminished until 1761 when we find the final mention of Moschopolitan merchants in a letter by Antonio Bartolovich. The Venetian consul in Dyrrachium, in a lengthy but fascinating letter, put forward the reasons that led the port of Serenissima to decline and drove the merchants to the markets of Central Europe (Papahagi, 1935; Vacalopoulos, 1958; 1969; 1980). The observations made by Bartolovich clearly indicate the economic focus that the Republic of San Marco had adopted. The heavy taxes imposed on the goods leaving the port of Dyrrachium led many merchants to Thessaloniki and Sagiada. This change in maritime routes, combined with the large number of shipwrecks that had occurred, made several merchants decide to turn to overland trade (Vacalopoulos, 1958; 1969; 2003). Apart from the consul's statements, another fact that should be taken into account is that tariffs (*dazi*) had been abolished in Ancona since 1737, through a decision taken by Pope Clement XII, followed by Trieste in 1754, according to a decree by Maria Theresia (Babudieri, 1988; Harlaftis, 2005). For the Venetian consul, the indicated solution that would revive the commercial traffic at the port of Dyrrachium was to lower the tax contributions imposed on the merchants; this never happened, however. The final mention of Moschopolitan merchants arriving at Serenissima is in a letter by Bartolovich on 8 February 1761. Thus, the trade relations between Venice and Moschopolis came to an end. However, they continued to relate a few years later intellectually. Theodore Kavalliotis, a distinguished scholar, cleric, and teacher from Moschopolis (Kekridis, 1991; Skenderis, 1928; Zaviras, 1872; Peyfuss, 1976; Papacostea, 1970), printed his work with the title *Protopeiria* at the printing house of Antonio Bartoli (Papahagi, 1935; 1934; Martinianos, 1957; Kilipiris, 1999; Patrinelis, 1989).

## Notes on contributor

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## **Déterminants socio-économiques du changement des pratiques dans la plateforme de chaîne de valeur du riz étuvé à Malanville, Bénin**

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### **Résumé**

Au Bénin, l'étuvage traditionnel est encore largement pratiqué par les transformateurs de riz, ce qui impacte négativement la qualité du riz. A travers la mise en place d'une plateforme d'innovation dans la commune de Malanville, une nouvelle technologie d'étuvage a été introduite pour améliorer le rendement à l'usinage et la qualité du riz local. Cette étude a analysé les déterminants du changement des pratiques d'étuvage du riz au niveau de la plateforme. Des entretiens semi-structurés et structurés ont été réalisés avec 200 femmes transformatrices (étuveuses). Les résultats ont montré que la plateforme d'innovation a permis un changement des pratiques d'étuvage conduisant à une amélioration de la qualité du riz. De plus, l'analyse du modèle logit binomiale a montré l'existence de certains facteurs extrinsèques (contexte social, innovation) aux étuveuses et qui ont contribué au changement de pratique d'étuvage du riz. Ainsi, cette étude suggère la promotion des

plateformes d'innovation dans les zones rizicoles afin d'améliorer la qualité du riz local au Bénin.

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**Mots-clés :** Plateforme d'innovation, riz étuvé, changement de pratique, amélioration de la qualité, Bénin

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## **Socio-Economic Determinants of Practices Change in the Parboiled Rice Value Chain Platform in Malanville, Benin**

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### **Abstract**

In Benin, traditional parboiling is still widely practiced by rice processors, which has a negative impact on rice quality. Through the establishment of an innovation platform in the municipality of Malanville, a new parboiling technology has been introduced to improve the milling yield and quality of local rice. This study aims to analyze the determinants of change in rice parboiling practices within the platform. Semi-structured and structured interviews were conducted with 200 women parboilers. The results showed that the innovation platform led to an improvement in parboiling practices, which in turn led to an improvement in rice quality. In addition, the binomial logit model analysis highlighted the existence of some extrinsic factors (social context, innovation) related to women parboilers and which have contributed to the change in rice parboiling practices. Thus, the study suggests the promotion of innovation platforms in rice production areas in order to improve the quality of local rice in Benin.

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**Keywords:** Innovation platform, parboiled rice, practice change, quality improvement, Benin

### **Introduction**

Le riz est une culture bien connue à cause de sa préparation facile et rapide. Il est progressivement entré dans les habitudes alimentaires et est

devenu la céréale préférée des populations urbaines en Afrique de l'Ouest (Tomlins *et al.*, 2005; Mendez *et al.*, 2013). Au Bénin, le riz fait partie des céréales abondamment consommées (Konnon *et al.*, 2014) avec une augmentation de la consommation annuelle de 10% entre 2013 et 2017 (Tondel *et al.*, 2020). Autrefois, considéré comme un aliment de luxe et essentiellement consommé les jours de fête, le riz occupe une place de plus en plus importante dans le quotidien des populations tant en milieu urbain qu'en milieu rural (Tomlins *et al.*, 2005; 2008; CCR-B, 2014; Tondel *et al.*, 2020). Le riz devient un aliment de base pour toutes les couches de la population. Sa consommation moyenne est estimée à 25 à 30 kg par habitant par an, soit une demande de 175 000 et 210 000 tonnes par an, dont plus de 80% couverts par les importations (MAEP, 2011).

Conscient du gap entre la production et la consommation, beaucoup d'efforts ont été fournis par le gouvernement pour accroître la production locale du riz qui passe de 109 871 tonnes en 2008 à 204 310 tonnes en 2015 afin de limiter l'importation du riz (MAEP, 2017; Gbede *et al.*, 2018). Cependant, il est noté que la population béninoise a une préférence pour le riz blanc importé, à cause de la qualité jugée « inférieure » du riz blanc local (Kinkpe *et al.*, 2016; Demont *et al.*, 2017). Plusieurs auteurs ont montré que les pratiques post-récolte peu recommandées ou peu appropriées, sont à l'origine de la qualité inférieure du riz blanc local, et que l'étuvage peut largement contribuer à son amélioration (Zossou *et al.*, 2012; Todomé *et al.*, 2018). En effet, l'étuvage ou la pré-cuisson est une méthode qui consiste à ré-humidifier, chauffer et sécher le paddy avant le décorticage. Il permet d'obtenir un riz de qualité physique, organoleptique et nutritionnelle supérieure à celle du riz blanc (Ndindeng *et al.*, 2015; Houssou *et al.*, 2016). L'étuvage du riz est souvent pratiqué par les femmes qui utilisent les méthodes traditionnelles ou artisanales pour une production à petite et moyenne échelles (Houssou *et al.*, 2014).

Au Bénin, l'étuvage est une importante activité génératrice de revenus pour les femmes (Adégbola, 2010). A cet effet, des dispositifs améliorés ont été introduits dans le pays afin d'améliorer la qualité du riz local. Selon Diop *et al.* (1997), un dispositif d'étuvage à vapeur composé de la superposition de deux demi-fûts a été introduit. Bien qu'ayant contribué à l'amélioration de la qualité du riz local, ce dispositif ne résiste pas à la chaleur et se rouille facilement (Houssou *et al.*, 2015). Sur la base de cette observation, un autre dispositif d'étuvage plus amélioré et résistant à la rouille a été mis au point par la recherche (Houssou *et al.*, 2015). Cependant, ce nouveau dispositif ne permet pas de faire l'étuvage d'une grande quantité de riz paddy par jour. Ainsi, en tenant compte des imperfections notées sur le dispositif, un nouvel équipement d'étuvage de capacité plus grande c'est-à-dire 300 kg par

traitement et muni d'un foyer amélioré incorporé a été développé (Hounyèvou-Klotoé et Houssou, 2012; Houssou *et al.*, 2015).

Dans la dynamique de toujours améliorer la qualité du riz local étuvé, le Centre du Riz pour l'Afrique (AfricaRice) et ses partenaires ont développé une innovation technologique dénommée « système amélioré d'étuvage du riz » (GEM). Cette technologie a pour objectif de contribuer au changement des pratiques au niveau des femmes étuveuses et d'améliorer de manière qualitative et quantitative le riz paddy local. Pour la diffusion de cette technologie, AfricaRice a opté pour des approches beaucoup plus participatives, à l'instar des plateformes d'innovation (Makini et al., 2013) en tirant leçons des approches traditionnelles de vulgarisation agricole qui sont considérées comme obsolètes, inadéquates, non inclusives (Shut al., 2016; Zoundji et al, 2020). En effet, les plateformes d'innovation peuvent être considérées comme des forums de rassemblement de diverses parties prenantes, provenant de divers secteurs avec des statuts professionnels différents, qui coopèrent pour identifier des solutions à des problèmes communs ou pour atteindre un objectif commun (Homann-Kee Tui et al., 2013). Elles permettent aussi aux partenaires de dépasser des solutions individuelles au profit de celles collectives et de contribuer au développement de leur capital humain et social (Ravichandran et al., 2020). Ainsi, la présente étude a analysé les déterminants socio-économiques du changement des pratiques d'étuvage du riz induit par la mise en place de la plateforme d'innovation au niveau des femmes transformatrices de riz (étuveuses).

## **Matériels et méthodes**

### ***Zone d'étude et échantillonnage***

La présente étude a été réalisée au Nord-Est du Bénin, dans le département de l'Alibori et plus spécifiquement dans la commune de Malanville. Cette commune s'étend entre 11° 52' 0" Latitude Nord et 3° 22' 60" Longitude Est avec une superficie de 3016 km<sup>2</sup> et limitée au Nord par la République du Niger, au sud par les Communes de Kandi et de Ségbana, à l'Ouest par la Commune de Karimama, à l'Est par la République Fédérale du Nigeria (INSAE 2016). Le choix de la commune de Malanville part du fait que ses conditions agro-écologiques sont très favorables à la production du riz (Assouma et al., 2019). En plus, elle est la première commune productrice de riz au Bénin et regorge d'un grand nombre de bas-fonds et de bassins où la production du riz se fait à une échelle très importante (MAEP, 2017).

La méthode d'échantillonnage aléatoire stratifié suivi d'un tirage aléatoire simple (Rondeux, 1999) a été utilisée pour sélectionner 200 femmes étuveuses. Ces femmes sont issues d'une base de données réalisée en 2016 par le Centre du riz pour l'Afrique (AfricaRice) et comporte une population totale de 538 étuveuses provenant de 22 groupements utilisant la plateforme

d'innovation. Il est à préciser que ces femmes étuveuses représentent la catégorie d'acteurs la plus importante en termes d'effectifs au niveau de ladite plateforme d'innovation.

### ***Collecte et analyse de données***

Les données d'ordres qualitatifs et quantitatifs ont été collectées à travers des entretiens structurés et semi structurés. Les données qualitatives ont été collectées à l'aide d'un guide d'entretien au cours des focus groupes pour comprendre l'amélioration des pratiques d'étuvage. Celles quantitatives ont été collectées à l'aide de questionnaire et portent sur les caractéristiques sociodémographiques des femmes étuveuses, les facteurs déterminants le changement des pratiques, etc. Les femmes étuveuses ont été également amenées pendant l'enquête à attribuer des scores aux différentes étapes d'étuvage du riz avant et après l'installation de la plateforme afin d'apprécier les changements ou les améliorations dans la pratique d'étuvage du riz. Ces scores graduels sont compris entre 0 et 5 selon le degré d'amélioration de chaque étape d'étuvage.

L'analyse du contenu des focus groupes a permis de faire une description des pratiques d'étuvage utilisées après l'installation de la plateforme d'innovation. Le test de wilcoxon qui est une alternative non paramétrique au test t de Student a été aussi utilisé pour comparer les pratiques avant et après l'installation de la plateforme d'innovation. La régression binomiale logistique a été utilisée afin d'avoir une idée sur les différents facteurs qui influencent le changement des pratiques. Ces données ont été traitées à l'aide des logiciels Excel et STATA 14.

## **Résultats**

### ***Caractéristiques sociodémographiques des femmes étuveuses***

L'âge moyen des femmes étuveuses est de 42 ans ( $\pm 11,74$ ) avec en moyenne 10 ans ( $\pm 5,78$ ) d'expérience dans la pratique d'étuvage du riz (Tableau 1). De plus, la majorité d'entre elles sont mariées (96,0 %) et sont dans des ménages de 6 personnes ( $\pm 2,38$ ) en moyenne. En outre, 82,0 % d'entre elles n'ont aucun niveau d'instruction. Le peu qui est instruit se retrouve au niveau primaire (14,5 %). Il y a seulement 3,0% et 0,5 % qui ont pu respectivement atteindre le niveau du premier cycle et du second cycle du secondaire. Notons également que l'étuvage constitue la principale activité pour 45,0 % des enquêtés. Par contre, 55,0 % mènent d'autres activités telles que le commerce, l'agriculture et la transformation. Enfin, les étuveuses (95,0 %) ont une faible implication dans les activités de la plateforme.

**Tableau1** : Informations sociodémographiques des femmes étuveuses

Variables	Description	Paramètre	Répondants (n=200)
Age	Age des répondants (en année)	moyenne Ecart- type	41,68 ± 11,74
Taille des ménages	Nombre de personnes vivant dans le ménage du répondant	moyenne Ecart- type	5,95 ± 2,38
Nombre d'année d'expérience	Année d'expérience dans l'étuvage du riz	moyenne Ecart- type	9,78 ± 5,78
Situation matrimoniale	Mariée	% de répondantes	96,0
	Divorcée	% de répondantes	0,5
	Veuve	% de répondantes	3,5
Niveau d'instruction	Aucun	% de répondantes	82,0
	Niveau primaire	% de répondantes	14,5
	Premier cycle	% de répondantes	3,0
	Second cycle	% de répondantes	0,5
Niveau d'implication des étuveuses dans la plateforme	Faible	% de répondantes	95,0
	Moyen	% de répondantes	3,5
	Fort	% de répondantes	1,5
<b>Principale activité des femmes</b>	Agriculture	% de répondantes	20,5
	Etuvage	% de répondantes	45,0
	Commerce	% de répondantes	32,0
	Transformation agro-alimentaire	% de répondantes	2,5

Source : Données de terrain

### ***Amélioration des pratiques d'étuvage***

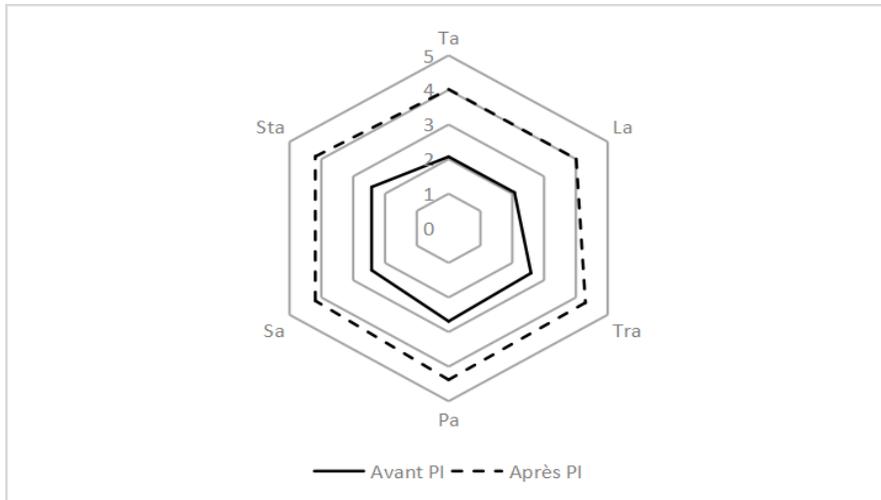
La plateforme d'innovation a favorisé le renforcement des capacités des femmes étuveuses à travers des formations sur les pratiques améliorées d'étuvage de riz. Ce renforcement a permis aux femmes d'améliorer leurs pratiques. Cette amélioration se traduit par l'introduction de nouvelles activités ou étapes telles que le triage, le vannage et le triple lavage qui se sont ajoutées aux pratiques anciennes. L'intégration de ces activités au processus d'étuvage explique l'amélioration de la qualité du riz étuvé à travers la réduction du taux de brisure, les graines de riz brûlés, et des impuretés. La procédure utilisée par les femmes après l'installation de la plateforme se résume dans le tableau 2.

**Tableau 2 : Description des pratiques d'étuvage**

<b>Opérations</b>	<b>Description</b>
Vannage et triage	Enlever les déchets par triage et vannage. Cette opération n'est pas réalisée par toutes les femmes
Lavage	Laver proprement le paddy avec de l'eau propre pour le débarrasser de sable qui se dépose au fond de la bassine et des déchets / grains non mûrs qui surnagent généralement l'eau.
Trempage dans l'eau chaude	Chauffer le paddy dans de l'eau propre jusqu'à l'élévation de la température (60°C environ) et laisser le tout refroidir pendant toute la nuit soit environ 12 heures avant la pré-cuisson.
Pré-cuisson	Mettre le paddy dans le bac perforé ou bassine percée placé préalablement sur une marmite contenant une petite quantité d'eau ne touchant pas le fond du bac. L'eau est portée à ébullition et la vapeur émise traverse les trous du bac pour la pré-cuisson du paddy. L'éclatement des balles de quelques grains de paddy ou la production d'un son lourd en tapant sur les grains avec la paume de la main marque la fin cette opération. Les femmes faisaient la pré-cuisson directement dans de l'eau. Mais grâce aux actions de renforcement de capacités, certaines femmes (45% de femmes) le font à la vapeur mais n'utilisant pas le matériel adapté.
Séchage du riz	Sécher le riz sur une surface propre pendant 2 heures au soleil. Le séchage doit continuer à l'ombre jusqu'à ce que le grain de riz donne un son sec lorsqu'on le teste entre les dents. Mais la majorité des femmes (90%) le font uniquement au soleil. Il est conseillé d'enlever les chaussures pour remuer de temps en temps avec les mains le riz séché.
Stockage	Le riz est souvent stocké dans les sacs de jute ou bassines. Il est conseillé d'éviter le stockage du riz directement sur un sol cimenté ou sur du matériel pouvant favoriser son humidification.

Source : Données de terrain

Le test de Wilcoxon a été donc utilisé pour apprécier l'existence d'une différence significative en matière d'amélioration des pratiques (Figure1). Il ressort aussi de cette figure que l'installation de la plateforme d'innovation a induit des changements dans le processus d'étuvage du riz avec un niveau d'amélioration bien visible à travers les scores attribués aux différentes étapes par les étuveuses.



**Figure 1:** Comparaison des pratiques avant et après d'installations de la plateforme  
Note : T= Triage, L= Lavage, Tr= Trempage, P= Pré-cuisson, S= Séchage, St= Stockage ; a  
= test de Wilcoxon significatif à 1%, b= test de Wilcoxon non significatif à 1%  
Source : Données de terrain

### ***Facteurs influençant le changement des pratiques d'étuvage du riz.***

Au regard des résultats de l'analyse de la régression, il ressort que plusieurs facteurs expliquent le changement des pratiques d'étuvage du riz (Tableau 2). Les résultats indiquent que le modèle logit est globalement significatif avec un pouvoir explicatif de 10% et un ratio de vraisemblance (-109.95317). Parmi les dix variables étudiées, quatre sont significatives. Le changement des pratiques d'étuvage du riz est influencé positivement par l'étuvage comme activité principale, le gain de temps, le prix du riz étuvé et négativement par la taille du ménage. La variable gain de temps influence positivement et significativement au seuil de 10% le changement des pratiques d'étuvage. En effet, presque toutes les femmes exercent d'autres activités génératrices de revenus et la volonté de gagner du temps pourrait les conduire à plus améliorer leurs pratiques. Cette variable a un effet marginal positif sur le changement des pratiques. Une augmentation du gain de temps augmenterait de 13,08% la probabilité de changer les pratiques d'étuvage.

L'étuvage comme activité principale est significatif au seuil de 1% et influence positivement le changement des pratiques d'étuvage. Cette variable a un effet marginal positif sur le changement des pratiques. Une augmentation de l'étuvage comme activité principale augmenterait de 25,68% la probabilité de changer les pratiques. Ce qui est normal, car les femmes ayant pour activité principale l'étuvage seront plus actives à appliquer les pratiques améliorées dans le but de changer la qualité de leur produit. Le prix du riz étuvé influence positivement et significativement au seuil de 10% le changement des pratiques d'étuvage. Cette variable a un effet marginal positif sur le changement des

pratiques. Une augmentation du prix du riz étuvé augmenterait de 0,215 % la probabilité de changement des pratiques. Aussi, la taille du ménage est significative au seuil de 5% et influence négativement le changement des pratiques d'étuvage. Cette variable à un effet marginal négatif sur le changement des pratiques. Une augmentation de la taille du ménage diminuerait de 3,86% la probabilité de changement des pratiques. Plus la taille du ménage est élevée, moins les femmes sont intéressées, parce qu'elles ont la main d'œuvre gratuite.

**Tableau 2:** Déterminants du changement des pratiques d'étuvage du riz

<b>Variables</b>	<b>Coefficients</b>	<b>Std. Err</b>	<b>Effets marginaux</b>
Age	.0109964	.0169786	.0021805
Quantité de riz étuvé	.0084412	.0150385	.0016738
Niveau d'instruction	-.168568	.3325305	-.0334256
Taille du ménage	-.1947599**	.0865817	-.0386193**
Amélioration du revenu	.4825816	.3905835	.091401
Amélioration de la qualité	.2109898	1.250942	.0398644
Gain de temps	.7149341*	.3953217	.1308187*
Prix du riz étuvé	.0108639*	.006052	.0021542*
Participation aux formations	.7523141	.8597968	.125158
Etuvage comme activité principale	1.279082***	.348931	.2568837***
Cons	-3.110296	2.19355	
<b>Nombre d'observations = 200</b>			
<b>Prob &gt; chi2 = 0.0065</b>			
<b>Log likelihood = -109.95317</b>			
<b>LR chi2(11) = 24.44</b>			
<b>Pseudo R2 = 0.1000</b>			

(\*) = significatif à 10% ; (\*\*) = significatif à 5% ; (\*\*\*) = significatif à 1%

Source : Données de terrain, 2019

## Discussion

L'étuvage du riz est un traitement hydro-thermique qui vise à améliorer la valeur nutritionnelle, les qualités physiques et organoleptiques du riz (Zossou, 2013; Dassou et al., 2021). Néanmoins, un mauvais étuvage, peut non seulement faire disparaître ces avantages, mais aussi réduire la valeur alimentaire du riz (Lawin, 2006). Cette étude a montré que l'installation de la plateforme d'innovation a permis aux femmes transformatrices d'adopter de bonnes nouvelles pratiques d'étuvage du riz. Ces pratiques adoptées se traduisent par de nouvelles étapes d'étuvage (vannage, le triage, le lavage et le trempage à l'eau chaude). Ceci confirme les travaux de Swaans et Pali (2013) qui ont souligné que la plateforme d'innovation est un mécanisme permettant de faciliter les apprentissages pour le développement des connaissances. A cet effet, les nouvelles connaissances acquises ont permis aux femmes étuveuses d'améliorer leurs pratiques (Zossou, 2013 ; Dassou et

al., 2021). Ceci a pour conséquence une amélioration de la qualité du riz produit avec un prix de vente plus intéressant. Ceci est confirmé par les travaux de Gbede et al (2018) qui ont aussi montré au Nord Bénin que le système d'étuvage moderne est plus performant que le système traditionnel. Il ressort de cette recherche que plusieurs variables déterminent le changement des pratiques d'étuvage du riz. Il s'agit du gain de temps, l'étuvage comme activité principale, la taille du ménage et le prix du riz étuvé. Cette étude a aussi montré que le gain de temps à un effet positif sur le changement de pratique d'étuvage du riz. Ceci pourrait être expliqué par le fait que le gain de temps stimule la motivation des femmes à utiliser les pratiques améliorées en vue de la réduction du temps de travail d'étuvage et de s'engager dans d'autres activités génératrices de revenus. Enfin, le prix du riz étuvé à un effet positif sur le changement de pratique d'étuvage. Ce qui signifie qu'une augmentation du prix du riz incitera les femmes à plus utilisé les pratiques améliorées.

## Conclusion

Cette étude s'est focalisée sur les déterminants du changement de pratique au niveau de la plateforme d'innovation de la chaîne de valeur de riz étuvé dans la Commune de Malanville. Il se dégage des différents résultats que l'installation de la plateforme d'innovation autour du système d'étuvage amélioré a favorisé une amélioration des pratiques d'étuvage à travers l'organisation des formations aux étuveuses et par ricochet une amélioration de la qualité du riz. Cette amélioration de la qualité du riz se traduit par la couleur blanche du riz et la réduction du taux de brisure, les grains de riz brûlés et des impuretés. Au regard des résultats le changement des pratiques d'étuvage est déterminé par les variables comme : gain de temps, l'étuvage comme activité principale, taille du ménage et prix du riz étuvé.

Pour que le riz étuvé localement soit compétitif sur le marché, il faudrait que le gouvernement et les partenaires puissent vulgariser le dispositif moderne d'étuvage dans les milieux ruraux au Bénin et promouvoir son utilisation exclusive pour la transformation du paddy (étuvage du riz).

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