



DOI: 10.2478/jolace-2019-0001

Intercultural competence of university teachers: a challenge of internationalization

Anna Zelenková & Dana HanesováMatej Bel University in Banská Bystrica, Slovakia
dana.hanesova@umb.sk; anna.zelenkova@umb.sk

Abstract

The aim of the authors is to respond to the growing demands on the intercultural competence of university teachers due to intensified internationalization pressures on higher education, especially due to the growing number of students and teachers' international exchanges. They report on an intercultural course design responding to this need, presenting a case study from Slovakia. First, they define the need of intercultural competence of university teachers, especially those teaching in English-medium study programmes. Then they share a) findings from a needs analysis preceding the design of a new curriculum for an intercultural competence course (ICC) at Matej Bel University (MBU) with three aims (development of linguistic, cultural and pedagogic competences); and b) results from action research during piloting the ICC course. A comparison of 2011 and 2018 surveys pointed to the growing dominance of the English language, including an increasing command of English by MBU teachers. The ICC curriculum, tailored to the pre-identified teachers' needs, proved to be a feasible way of facilitating their intercultural competence. Its implementation revealed persistent prejudices and difficulties associated with overcoming them. It also confirmed a significant deficit in preparing university teachers for their role as intercultural mediators in English-medium courses.

Key words: intercultural competence, teacher training, higher education, internationalization, English-medium studies

Introduction

Now more than ever before, university students, teachers, researchers, and other staff are exchanging their place of work or study to gain international experience and share their expertise in teaching/learning processes, educational management, publishing, and research collaboration. Teaching in an international university context has become a challenge for all university teachers, as they should acquire new concepts and paradigms in order to manage diversity in education (Gopal, 2011).

As the rising level of internationalization of universities is evident—especially in an influx of international students—there is a growing need for the university teachers to be able to communicate with them in order to ensure effectiveness in

educational processes. Universities with their foreign students and teachers, representing different cultures, have become platforms of intercultural communication (cf. Janík, 2017). This communication will turn out to be beneficial only if it is both linguistically and culturally appropriate—open to otherness, flexible in changing routines, eager to investigate and appreciate different cultural values, practices, or norms, evaluating them without prejudices and stereotypes.

Raising intercultural competence at universities might also enhance the chances for employability of their graduates in the international labour market. Although Europe as a continent has always been a multilingual and multicultural region, the current EU educational policy requires an equal opportunity and challenge for all its inhabitants to be educated for communicating and working in the internationalized professional environment. Therefore, university teachers should support cultural diversity by self-reflection, learning, teaching and training intercultural strategies that respond to all students' needs, expectations, experiences, and cultural background; by revealing social stereotypes, and developing their own cross-cultural teaching strategies ('A New Skills Agenda for Europe', 2016; 'European Skills/Competences, Qualifications and Occupation' by ESCO, 2018).

University teachers are expected to be both internationally acknowledged scientists and, at the same time, effective practitioners in linguistically, culturally and racially diverse classrooms and schools (Banks, 2010). Arguments for extending the capability of university teachers for intercultural dialogue are based on the assumption that mutual understanding among various cultural groups is beneficial, even as their members become more aware of differences (Javorčíková, 2009). Intercultural competence of university teachers is essential for reducing the barriers between them and their students representing various cultures (The European Centre for Clinical Research Training, 2018). Are they prepared for this new task? We are trying to answer this question in our article.

1. The intercultural competence of university teachers

An interculturally competent person can be described as a person not only with some acquired knowledge on culture and its cognitive comprehension, but competent to demonstrate intercultural empathy, respect, tolerance, sensitivity and flexibility, as well as the openness to negotiate, the ability to argue, the good will to understand others, discuss with them, and reach consensus (Sun, 2014). He/she is a person interculturally aware, sensitive and adroit (Chen & Starosta, 1996). The interculturality should penetrate into all three dimension of his / her personality and relationships: cognitive (awareness of cultures and self-awareness), affective (tolerance, empathy, appreciation of diversity) and behavioural (acting towards 'others', interaction and cooperation skills) (Zelenková, 2010; Barrett, Byram, Lázár, Mompoin, Gaillard, & Philippou, 2014;

Genç, 2018).

According to Deardorff's pyramidal model of intercultural competence, the prior emphasis should be placed on attitudes (respect, openness, and curiosity and discovery) that represent the basic required level of intercultural competence (Deardorff, 2006, p. 254). In the case of university teachers, appropriate, unprejudiced attitudes include openness toward learning from professionals and students representing other cultures and active attempting to build cooperative relationships with them. If teachers' personal attitudes are accompanied by their knowledge about cultures, and critical thinking skills, then the desired internal (adaptability, flexibility, empathy, etc.) as well as external outcomes (proper and effective communication and behaviour) may appear (Deardorff, 2006). The intercultural competence of a teacher presupposes the shift from the attitudinal level to the level of intercultural behaviour and interaction in various cultural professional contexts. University teachers teaching various scientific courses to culturally mixed groups of students have to become facilitators of such a comprehensive kind of intercultural teaching and learning (Croese, 2011).

In case of using English—the current *lingua franca* in international communication—a new *cultural* role of English, is advocated, for example, by Morgado (2017) or earlier in the Council of Europe (CoE) document 'Autobiography of Intercultural Encounters' by Byram, Barrett, Ipgrave, Jackson, & Méndez García (2009).

Interculturally competent university professionals should be aware of culturally different ways of viewing the world, as evidenced in the thinking, habits, and behaviours of their foreign colleagues and students (Anossova & Dmitrichenkova, 2018, p. 73). They can initiate positive, sensitive and effective communication—verbal and non-verbal—with students coming from various cultures (Byram et al, 2009; ESCO, 2018). Opportunities for harmonious interaction and successful collegial dialogue that lead to mutual comprehension without disrupting an individual's integrity are growing in proportion to the level of professionals' intercultural competence. The university teachers' role is to mediate—harmonize the relationship in the multicultural group of students and colleagues. That implies that the task of university teachers is not only to function in a role of a science-related content expert—ideally with a high command of the foreign language, and teaching a course in it. They are to master a skill of teaching students from various cultures in such a way, which can become a means of their potential reconciliation.

The research indicates the weak preparedness of some investigated universities for this new societal situation. Little attention has been paid to the role and quality of English used in the English-medium programmes or in academic research (Chigisheva, Soltovets, & Bondarenko, 2017, p. 145), to the relevant preparation of teachers to teach in these programmes (Dearden, 2014), or,

generally, to the development of teachers' intercultural knowledge and skills for 21st century schools (Lázár, 2011, p. 113-126). Zerzová's research (2018, p. 106) shows the persistent emphasis on the cognitive dimension of teachers' competence development, in line with the "traditional teaching culture".

If nurturing intercultural competence of university teachers is to be successful, it should focus not only on transmission of the knowledge of some superficial information about cultural differences, but especially on formation of their attitudes, and on experiential and constructive acquisition of the values of tolerance and justice (Kosová, 2012). The transformation of teachers and students' identity via nurturing their intercultural competence is a "dynamic performative process conditioned by social norms typical for the culture of schooling that they are embedded in and that are imposed by the school curriculum in its largest sense" (Luić, 2018, p. 76). This raises a need to design a more interculturally aware curriculum, which uses the culture of students involved in the educational process as their learning resource (Arphattananon, 2018) and where the process of teaching and learning culture happens as "a relational process" (Michelson, 2017). In such way, the university teachers may actively mediate not only the semantic models of interculturalism but also their axiological dimensions (Vančíková, 2013).

2. Research of raising intercultural competence of teachers in a Slovak university

The growing presence of foreign students at universities raises a number of important questions, often not explicitly treated in the university strategies on internationalization. To which extent are the university teachers without any prior intercultural training able to respond to the multiple needs of their foreign students? For example, are they able to respond to their growing need for academic language skills (to read and write academic texts in a foreign language, to research for suitable materials, to comprehend university lectures, to make notes from them, to complete ongoing and final assignments)? Or to their need for support when facing the situation of a culturally different, unknown university environment, including exams, and classroom interaction? Are the teachers of the English-medium study programmes to multicultural groups of students able to interact with them in a pedagogically and interculturally competent way?

Although most universities in the Central European post-communist region respond to the challenge of internationalization by producing their strategic policy documents on internationalization, practice at most Slovak universities shows signs of insufficient implementation of such declarations. There are visible deficiencies in the pedagogical and didactic preparedness of university teachers for teaching in an international class. Generally, there are no standards of the level of their intercultural competence (ICC). Their ICC training usually happens ad hoc,

via international cooperation in various projects which might focus, for example, on wider competence for global citizenship (Svitačová et al, 2015). However, a professionally supervised discussion on the intercultural aspects of the interaction with foreign students is often missing.

The repeated feedback from several students studying at Matej Bel University (MBU) in Banská Bystrica as well as from the personal experience of foreign language MBU teachers or incoming foreign teachers has indicated an urgent need to improve ICC of the MBU teaching staff. In light of this feedback, the question arose: How can university teachers be helped to grow in their intercultural competence? In 2011, a group of foreign language teachers from the Faculty of Economics decided to prepare an ICC course curriculum for the MBU teachers planning to teach or involved in teaching in English-medium programmes (via a project 'Enhancing Foreign Language-Medium Programmes at MBU' No. 26110230025, co-financed from the European Social Fund). First, they carried out a survey of linguistic and intercultural needs of MBU teachers. Based on the analysis of actual linguistic and intercultural needs, they designed and piloted the first version of the ICC course in the years 2012-2014. Due to the low number of teachers of French and German, only one course for teachers of German was designed. The following research report focuses solely on the course in English.

The proposed ICC course had three kinds of improvements as its triple aim: a) general communicative competence in English (as a pre-requisite for teaching in English-medium programmes); b) pedagogical-didactic competence (pedagogic communication and teaching-learning skills); and c) the intercultural competence (intercultural awareness, knowledge, and communication skills) of MBU teachers.

The ICC curriculum focused on various topics related to the issues which the teachers were dealing with in their English-medium courses (teaching and learning strategies, development and assessment of critical thinking skills, differences between the learner-centred and teacher-centred approach, team teaching principles, identification of learning outcomes, questioning and discussion techniques, or the concept of diversity in international groups of students such as education background, education culture, multiple intelligences, requirements on student's performance).

As for the methodological procedure, a pedagogic case study was used. It consisted of a series of pedagogic situations (events), which required analysis, identification of problems and suggestion of possible solutions. The training method was based on Kolb's experiential learning cycle. Situations were simulated and video series were used to allow teachers to experience 'otherness' in the broadest terms (relation to authority, body language, work relations, non-judgmental communication); to reflect on the experience and make generalizations backed by theories; and, finally, to apply knowledge they gained in their own teaching practice. Besides contact lessons, a part of the ICC course was

accomplished via the individual study using an electronic online learning environment with pre-prepared learning activities aimed at individual improvement, such as listening and reading comprehension exercises, or language use and grammar exercises.

2.1 Research methodology and research participants

Quantitative survey of needs analysis: The first round of the needs survey was completed in 2011, in conjunction with the operation of joint-study programmes between MBU and French and German universities. The second survey of teachers' needs was conducted in 2018 in order to analyse the teachers' current needs, to investigate the differences between the two sets of data in order to update the course in the future. The idea of measuring the international needs of MBU teachers has become also the theme of the newly constructed research project proposal with a wider national impact (KEGA 004UMB-4/2019).

The questionnaire consisted of nine multiple-choice questions. All MBU teachers got a chance to choose one or more alternatives based on their self-assessment of their own linguistic and intercultural skills. The final number of respondents in 2011 was 185 teachers, the second set in 2018 consisted of 218 teachers (41% of all MBU teaching staff), representing all MBU faculties. Although the focus of this study is the intercultural competence of university teachers, the survey authors did not consider it wise to separate it out from the rest of the linguistic competences (cf. CEFR, 2018).

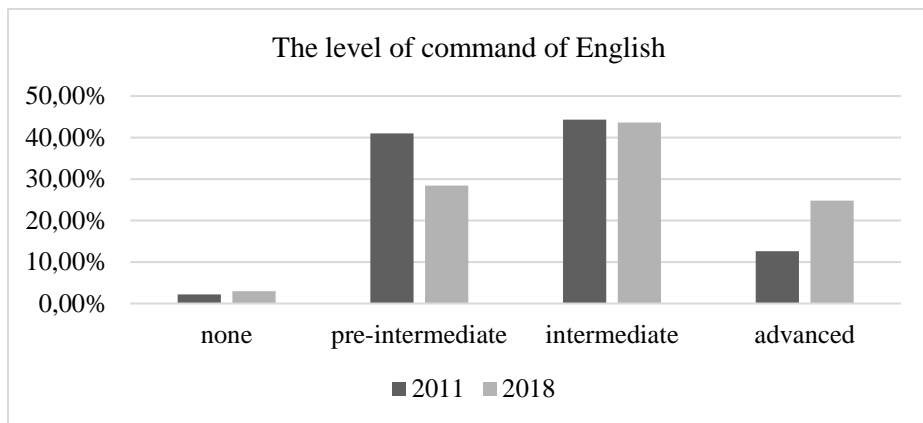
Qualitative action research of the ICC course: In parallel with the ICC course piloted teaching, its authors carried out thorough action research both to increase accountability in relation to the above-mentioned granting scheme and to improve the course so that it yielded more benefits to both the institution and the students enrolled. The piloted ICC course was attended by twenty MBU teachers teaching / planning to teach in English-medium courses.

The action research of the ICC course used several evaluating techniques, predominantly observation, field notes, interviews, reflections, analysis of written assignments, and other kinds of feedback allowing the evaluation and, later on, innovation of the first draft of the ICC course curricula.

2.2 Findings

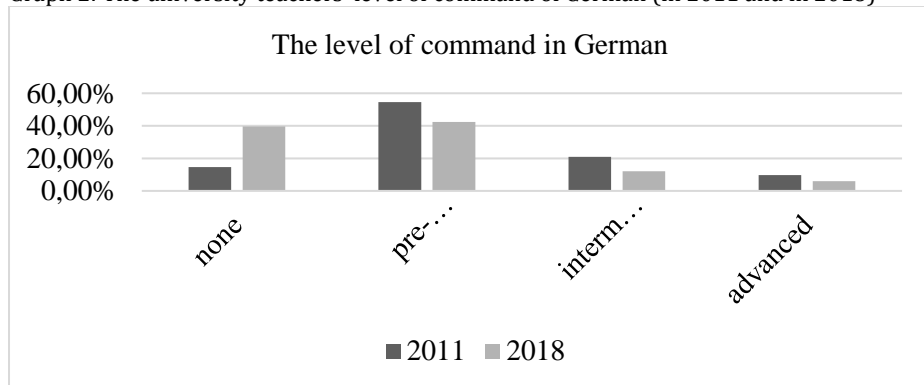
The comparison of both **surveys** (in 2011 and in 2018) among MBU teachers showed that, based on self-assessment, the number of MBU teachers (2018) with an advanced level of English doubled (from 12.6% to 24.8%) and the number of pre-intermediate users of English fell from 41% to 28.4% (see Graph 1).

Graph 1: The university teachers' level of command of English (in 2011 and in 2018)



On the other hand, the level of command of three other world languages, often used in the past, was lower. The number of intermediate and advanced users of French fell from 8.7% to 4 or 5%. The number of users of German on the intermediate level fell from 21% to 12% and on advanced level from 9.8% to 6%. The number of users of Russian fell from 29% to 12.1% in the intermediate group and from 6.9% to 5.5% in the advanced group. In all these languages, the number of those respondents without any command of these foreign languages rose (in French, from 60.9% to 79%, in German, from 14.7% almost threefold to 39.7%).

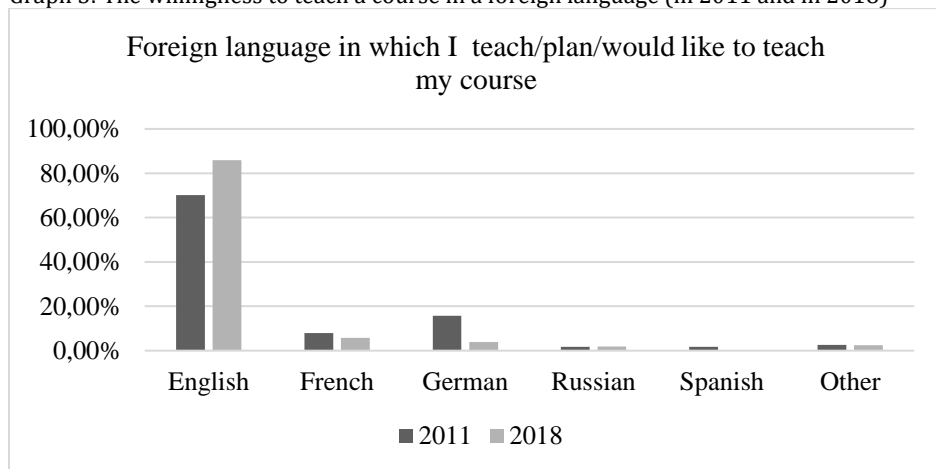
Graph 2: The university teachers' level of command of German (in 2011 and in 2018)



Graph 2 presents an example of these shifts. There was only a very slight increase in the numbers of pre-intermediate and advanced users of other relatively rare foreign languages (by 1-2% in Spanish, Italian, Chinese, Arabic, and Latin).

Also, the numbers of teachers teaching or wanting to teach English-medium courses fell by 3.9% from 59.5% in 2011 to 55.6% in 2018. Those teachers who teach or would like to teach in a foreign language could chose in which language they would like to do it (Graph 3). Their responses were in line with their growing competence in English and declining competence in other foreign languages. In 2011 over 70% and in 2018 almost 86% of such respondents could imagine teaching English-medium courses. The number of instructors teaching (or planning to teach) in German dropped fourfold—from 15.8% to only 4%, French from 7.9% to 5.8% and Spanish from 1.9 to zero. Only the motivation to teach in Russian remained at the previous level.

Graph 3: The willingness to teach a course in a foreign language (in 2011 and in 2018)



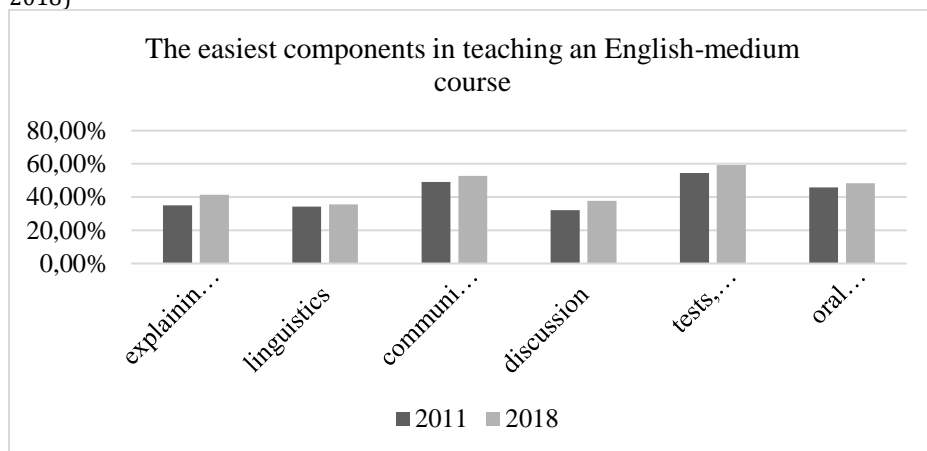
The question about the perceived level of difficulty associated with teaching English-medium courses revealed other interesting data. The 2018 respondents with a higher command of English considered all components of teaching an English-medium course less difficult than the 2011 respondents (see Table 1).

Table 1: Opinions about difficult components in teaching an English-medium course

Difficult/very difficult components in teaching an English-medium course - opinions	2011	2018
Contributing to and leading a discussion, argumentation	68%	61%
Language of professional text (grammar, logical structure, subject related, academic discourse)	65.4%	65.4%
Explanation of the subject's professional content	64.5%	58%
Oral testing	60%	50%
Communication with student in class and out of class (mentoring, consultations)	50%	47%
Assessment and evaluation of written assignments (commenting on results, justifying decisions, explaining the level of achievement)	50%	40%

Complementary evidence that all elements of teaching an English-medium course are easier for advanced language users (2018) is presented in Graph 4, with the highest percentage of respondents considering teaching a particular component to be easy or easiest in teaching English-medium courses.

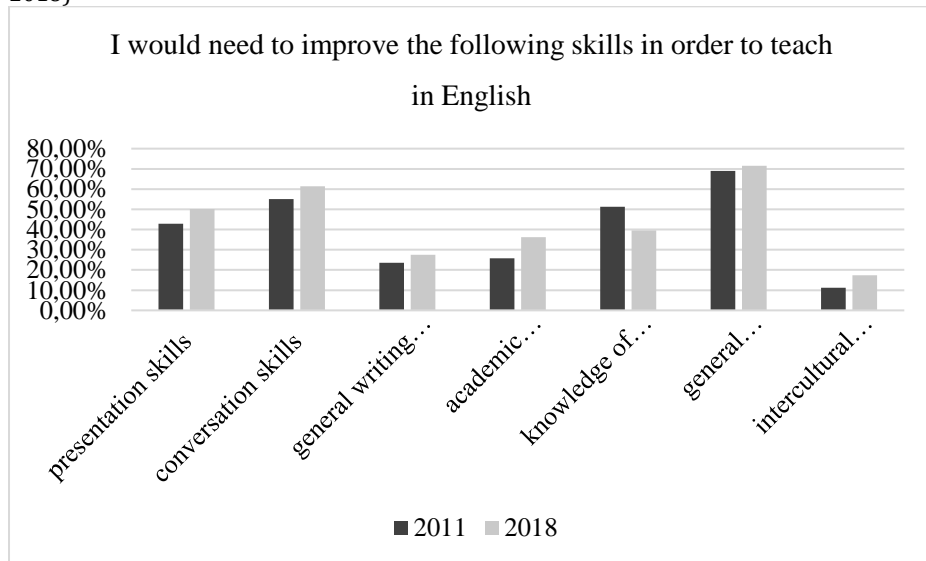
Graph 4: The easiest components in teaching an English-medium course (in 2011 and in 2018)



Participants also responded to the question which language skills they would need to improve (Graph 5). The biggest group of respondents in 2011 and in 2018

indicated the most needed area to be general proficiency in English—up to 70%. Next, they indicated the improvement of conversation skills—55% in the 2011 group, 61% in 2018.

Graph 5: The desire to improve a certain skill in order to teach in English (in 2011 and in 2018)



The 2018 respondents considered it most important to improve their *oral* communication skills (e.g. presentation skills). Their desire to improve in academic and professional language proficiency fell in 2018. They did not feel such strong a need to focus on science-related terminology (from 51% to 40%). On the other hand, when it comes to writing, they put more emphasis on their academic writing than on their general writing skills (from 25% in 2011 to 36% in 2018). The need for improvement was raised also in the area of intercultural awareness. About 12% of respondents in 2011 and almost 18% in 2018 indicated that multicultural education was an area needing their attention.

The administrators of the questionnaire in 2018 added one more question for the respondents about the environment in which they would like to develop their linguistic and intercultural competence. Over 60% of teachers welcomed the opportunity to improve it at MBU as their workplace, most of them in the English language (80%).

Findings from action research

Observations, interviews and ongoing assessment of the ICC course confirmed the presence of the combined effort of the ICC course authors, its teachers as well as participants towards the fulfilment of all three constitutive objectives of the ICC course. As a thread, through all three objectives the cultural element was visible, playing an integral part in the ICC course.

The case study method allowed for dealing with more than one pedagogic issue at the same time and thus provided opportunities for active participation and discussion. Participants were solving the problems individually and in groups. The course gave the participating teachers an opportunity to clarify and reflect their own philosophy and approaches to teaching.

The final feedback from the course participants revealed that most of them welcomed the opportunity to improve not only their intercultural but also their pedagogical competence, namely the knowledge and application of pedagogical theories necessary for proper decision-making in educational practice. The use of the method of a case study helped them to acquire skills of using various organizational forms, such as pair and group work, defining learning outcomes, questioning and discussion strategies, and assessment skills. Although the final presentations of the participants revealed that most of them welcomed the new methodology of the ICC course, and were willing to implement the innovative methods into their English-medium course, others demonstrated their resistance against innovative methods and forms of teaching, especially to group and peer work. Their deficit of theoretical knowledge backing their teaching methods was evident.

The action research detected very low awareness about other educational cultures by up to 70% of the ICC course participants. Teachers still carry with them lots of deep-rooted stereotypes about nationalities and ethnic groups. They make generalizations in the assessment of students' performance based on nationality. For example, some teachers put foreign students into stereotypic national or ethnic groups, such as: students from this country are lazy or they do not know how to make presentations, students from another country are always good in speaking, and you can rely on them to contribute to class discussion, etc.

On the other hand, it was evident that during the course the participants' attitudes, expressions and responses gradually changed towards greater openness and understanding of cultural diversity in their international university setting. This shift was nurtured by activities specifically prepared by the curriculum designers. For example, the course attendants had to face the fact that international groups of students would bring with them different values, beliefs and norms of behaviour, creating a completely new situation. They acquired a new view of perception of their own culture and realized stereotypes in their thinking, communication and behaviour.

2.3 Discussion and implications from needs analysis

In accordance with the global trends, the survey results confirmed the dominant position of English as a lingua franca in MBU courses for international students, and therefore the necessity to conduct the ICC courses for university teachers in the first place in English. The increased level of mastering English reflects the intense internationalization of education and the societal attention paid to the effective foreign language pedagogy, including the current education policy in Slovakia, offering English as the first foreign language at all levels of education (from elementary to postgraduate).

The survey results also indicate the importance of a tailor-made ICC course curriculum fitting the identified needs of its participants. The ICC course should focus on such components in teaching English-medium courses that the attendants mark as the most difficult. In our case, the group of identified needs involved the necessity to lead discussions and argumentation, to engage effectively in academic discourse and difficult professional texts, to explain professional content and vocabulary, and to conduct oral tests. Although the respondents labelled general communication with students and assessment of their written assignments to be the easiest components, it is important to remember that more than half of them still expressed their need to improve in these skills. When it comes to writing, the teachers put more emphasis on their academic writing than on their general writing skills (from 25% in 2011 to 36% in 2018). This finding may reflect the current growing pressure on publishing in English, and the university teachers' stronger awareness of their deficiencies in academic writing (Cole & Spišiaková, 2017).

The reduced number of MBU teachers teaching or willing to teach in foreign languages might be the result of ending externally subsidized projects at MBU. Another reason might be the fact that the enthusiastic MBU teachers previously involved in teaching courses in a foreign language actually did not receive any adequate support—either methodological or financial—to continue to develop the international spirit of the university by their activity. Of course, further research would be required to confirm these causes. The good news on that front is that in some cases negotiations are underway to continue joint-study programmes or design new ones.

A good sign of the gradually opening community of university teachers toward growing interculturalism is that their intercultural awareness has increased since 2011.

The fact that a majority of MBU teachers welcomed the opportunity to improve their linguistic, pedagogic and intercultural competence at their workplace leads us to expect that the next application of the ICC course in the university setting has the potential to be useful for the university teachers.

2.4 Discussion and implications from action research

The interviews with the attendants of the ICC course confirmed their personally perceived need to develop their general communicative competence in English. Under the pressure of internationalization, university teachers realize the challenge to enhance their ability to communicate with their students in a foreign language, and to do so in a culturally and pedagogically competent way. For example, they have to be able to clearly set and explain learning objectives, to explain and justify their assessments in relation to the number of credits offered, and to assist students in their learning (for example, giving advice related to the available resources, such as libraries or online databases, providing help through consultations and mentoring, and socializing with students during various events such as the International Students Day).

The ICC course has facilitated development not only of linguistic skills but also of pedagogical skills of its attendants. The feedbacks indicated that the learner-centred approach with the teacher being a facilitator and acting as one of several resources was successfully applied in the ICC course. It has become evident that the ICC course should lead the teachers to believe that “nobody should be disadvantaged ... all students require some level of support in acquiring academic cultural capital and adjusting to higher education practices ... it should include all students’ backgrounds and cultures” (Caruana, 2011, p. 3). The ICC course should offer freedom for significant choice among teaching methods enhancing critical thinking skills including heuristic and problem-solving methods, discussion, or reflection.

Through the feedback and qualitative evaluation, the ICC course has proved to be feasible in contributing to the raised level of intercultural competence of most ICC course participants related to their comprehension of the concept of culture and their awareness of multicultural values. They were able to see the emphasis on the need of re-shaping their sets of reactions to various cultural issues, as well as openness to valuing other cultures.

On the other hand, teacher trainers in the piloted course observed that in spite of these perceptions, the communication with the participants during the ICC course showed some discrepancies between their real competences in interpersonal communication and those that they perceived and verbalized. Skills at communicating with students in the classroom or in classroom management serve as examples. It turned out that culturally responsive teaching might remain to be one of the subtlest deficits of an ICC course for most ICC participants. Although they were ‘culturally emphatic’, most course participants did not perceive their intercultural awareness as critical (comparable to results of Genç, 2018). One of the teachers mentioned the case when an Erasmus student from Finland claimed that before coming on Erasmus to Slovakia, she had never written a certain kind of test used by the Slovak teacher and that such a difference of

educational culture might have led to her weaker exam results. In another example, a group of students from another culture got poor final assessment simply because a Slovak teacher assessed their presentations in class as inadequate (not knowing that those students were never required to do presentations in their home university as part of their final assessment).

The most painful part of the ICC courses was emerging evidence that some participants made strict assessments based on 'otherness' as something differing from 'our' (Slovakian) norms (which were considered to be the only right values). The course revealed several teachers' unconscious prejudices.

Nevertheless, the observations and interviews in this action research indicated that the ICC course facilitated to raise MBU teachers' awareness of stereotypes in their thinking, behaviour and ability to view other people's behaviour from the perspective of those people's own cultural backgrounds. It was the first time the MBU teachers in foreign language courses got such a professionally supported opportunity to recognize their own intercultural attitudes and stereotypes and to improve in related intercultural skills. Their final interviews indicated that they appreciated the opportunity to gain such self-awareness.

Due to our action research, we can suggest a list of necessities to facilitate university teachers' competences to work effectively in an international education context (Stone, 2006). Levels of communicative and social skills that enable them to establish positive relationships and enhance positive social interaction at their workplace should be encouraged. Supportive learning environments for the development of their understanding of cultural diversity and the growth of their 'global citizenship' competence should be well structured and designed.

Conclusion

In our study, we pointed at the current trend of internationalization of universities, manifested in the increasing frequency of intercultural exchanges and the mobility of both students and teachers. Universities have become international workplaces and the professionals who work there must face these new challenges. Based on the experience and practice of universities in the Central European region, we warned that university teachers have not been systematically trained and prepared for the new requirements related to this kind of professional intercultural communication.

Our experience with facilitating the development of university teachers' professional communication and intercultural skills confirmed the existence of an enormous deficit of attention paid to this issue. The fact that university teachers facing the teaching of growing numbers of international students are not offered adequate professional training is often simply ignored and the examples of good practice are rather rare (Lázár, 2011). The most important conclusion we want to

emphasize is the pressing need for raised awareness about this deficit at the international, national (governmental), and institutional (managerial) level.

Our desire was to present a modest proposal for tackling this deficit via offering a specialized intercultural communication training for university teachers. Its tailor-made content should reflect their subject-specific communication needs, keeping in mind that they have to be prepared to operate in an increasingly international environment. Thus, the vision of university teachers' lifelong education has to be elaborated on a more systematic level, just as teachers at elementary and secondary schools are continually educated. However, an important question remains. Who should be responsible for promoting the systematic preparation of university teachers for the challenges of the international environment? We realize that the creation of such teacher preparation requires an interdisciplinary endeavour as it involves raising teachers' pedagogical expertise, communication competences and interculturality. In the case of MBU, several foreign language teachers with intercultural learning experience and aware of this need, have initially prepared and conducted such training but they do not consider this a system solution. A body of experts or an intercultural training institution will be required.

The action research during the implementation of the ICC course curriculum uncovered the discrepancies between the expectations of the course teachers and the attendants' personal perceptions and the actual state of their underdeveloped intercultural attitudes. These findings remind us of the above-quoted appeals from Deardorff (2006) and Byram et al (2009) for the cultivation of the university teachers' prejudicial attitudes and stereotypical thinking. Overcoming them will require targeted training efforts in the near future. It is obvious that university teachers participating in English-medium courses, in addition to being able to teach the lingua franca, can affect a wide range of students. The main reason of their intercultural training is to raise their awareness of their individual responsibility for becoming ambassadors among cultures, for understanding cultural diversity, for being interculturally competent communicators, mediators among professionals and students from various cultural backgrounds, supporting and disseminating the idea of global citizenship.

Acknowledgment

This paper is one of the outputs of the research project KEGA No. 033UMB-4/2017 (E)migration as a political, ethical, linguistic and cultural phenomenon in the era of globalization and KEGA No. 006UMB-4/2017 Creation of doctoral school model with emphasis on innovative supporting methods of scientific-research competences.

References

- Anossova, O. G. & Dmitrichenkowa, S. V. (2018). Sociocultural, intercultural and translation competence for engineering students. *JoLaCe*, 6(2), 71-81.
- Arphattananon, T. (2018). Multicultural education in Thailand. *Intercultural Education*, 29(2), 149-162.
- Banks, J. A. (2010). Multicultural education: Characteristics and goals. In J. A. Banks & C. A. Banks (Eds.), *Multicultural Education: Issues and perspectives* (7th ed., 1-30). New York, NY: John Wiley.
- Barrett, M., Byram, M., Lázár, I., Mompoin, Gaillard, P., & Philippou, S. (2014). *Developing intercultural competence through education*. Strasbourg: Council of Europe Publishing.
- Byram, M., Barrett, M., Ipgrave, J., Jackson, R., & Méndez García, M.C. (2009). *Autobiography of intercultural encounters: Context, concepts and theories*. Strasbourg, France: Council of Europe Publishing. Retrieved from https://www.coe.int/t/dg4/autobiography/source/aie_en/aie_context_concepts_and_theories_en.pdf.
- Caruana, V. (2011). Internationalisation and diversity: Exploding myths and making connections. *Discovering Pathways for Inclusion: a focus on learning for diversity*. Retrieved from http://www.heacademy.ac.uk/resources/detail/internationalisation/Viv_Caruana_Leeds_Met.
- Chen, G. M., & Starosta, W. J. (1996). Intercultural communication competence: A synthesis. *Communication Yearbook*, 19, 353-384.
- Chigisheva, O., Soltovets, E., & Bondarenko, A. (2017). Functional foreign language literacy for global research career development: analysis of standardized open-ended interview responses. *XLinguae*, 10, 138-153.
- Cole, D., & Spišiaková, M. (2017). Writing to be read. *Philologica LXXXVI Lingua Academica*, 5, 43-52. Bratislava, SK: Comenius University.
- Council of Europe. (2018). *CEFR - Common European Framework of Reference for Languages: Learning, Teaching, Assessment. Companion volume with new descriptors*. Retrieved from <https://rm.coe.int/cefr-companion-volume-with-new-descriptors-2018/1680787989>.
- Croese, B. (2011). Internationalization of the higher education classroom: Strategies to facilitate intercultural learning and academic success. *International Journal of Teaching and Learning in Higher Education*, 23, 388-395.
- Dearden, J. (2014). *English as a medium of instruction – a growing global phenomenon*. The British Council. Retrieved from https://www.britishcouncil.org/sites/default/files/e484_emi_-_cover_option_3_final_web.pdf.

- Deardorff, D. K. (2006). The identification and assessment of intercultural competence as a student outcome of internationalization. *Journal of Studies in International Education*, 10, 241-266.
- European Centre for Clinical Research Training. (2018). *Intercultural communication skills*. Retrieved from <http://www.eccrt.com/courses/intercultural-communication-skills>.
- European Commission. (2016). *Communication from the Commission to the European Parliament, the Council, the European economic and social committee and the Committee of the regions: A New Skills Agenda for Europe*. Brussels. Retrieved from <http://eur-lex.europa.eu/legal-content/EN/TXT/?uri=CELEX:52016DC0381>.
- European Commission. (2018). *ESCO Strategic framework: European Skills, Competences, Qualifications and Occupations*. ESCO Board. Retrieved June 4, 2018 from <https://ec.europa.eu/esco/portal/home>.
- European Commission. (2018). *Europe 2020: A European strategy for smart, sustainable and inclusive growth*. European Commission. Retrieved from <http://ec.europa.eu/eu2020/pdf/COMPLET%20EN%20BARROSO%20%20%20007%20-%20Europe%202020%20-%20EN%20version.pdf>.
- Genç, G. (2018). Are Turkish EFL pre-service teachers ready to manage intercultural challenges? *Intercultural Education*, 29(2), 185-202.
- Gopal, A. (2011). Internationalization of higher education: Preparing faculty to teach cross-culturally. *International Journal of Teaching and Learning in Higher Education*, 23, 373-381.
- Janík, Z. (2017). Negotiation of identities in intercultural communication. *JoLaCe*, 5(1), 160-181.
- Javorčíková, J. (2009). Lessening of Englishness: Traditional Values at the Beginning of a New Millenium. In R. Trušník & K. Nemčoková (Eds.), *Theories in practice: proceedings of the First International Conference on English and American Studies* (195-204). Zlín, CZ : Univerzita Tomáše Bati.
- Kosová, B. (2012). *Filozofické a globálne súvislosti edukácie. [Philosophical and global context of education]*. Banská Bystrica, SK: Faculty of Education, MBU.
- Lázár, I. (2011). Teachers' beliefs about integrating the development of intercultural communicative competence. Case studies of Hungarian pre-service English teachers. *Forum Sprache*, 5, 113 -127.
- Lujić, R. (2018). Classroom Participation as a Performative Act of Language Learners' Identity Construction. *JoLaCe*, 6(3), 72-84.
- Michelson, K. (2017). Teaching culture as a relational process through a multiliteracies-based global simulation. *Language, Culture and Curriculum*, 31(1), 1-20.
- Morgado, M. (2017). Intercultural communicative competence. In E. Císlerová & M. Štefl. (Eds.), *Intercultural communicative competence: A competitive advantage*

- for global employability (p. 10-12). Prague, CZ: Czech Technical University in Prague.
- Stone, N. (2006). Conceptualising intercultural effectiveness for university teaching. *Journal of Studies in International Education*, 10, 334-356.
- Sun, Y. (2014). *What is intercultural communicative competence?* 15.12.2014. Retrieved from blog.tesol.org/what-is-intercultural-communicative-competence/.
- Svitačová, E., Mravcová, A., & Moravčíková, D. (2015). Globálne rozvojové vzdelávanie na Fakulte ekonomiky a manažmentu SPU v Nitre v Nitre [Global developmental education at the Faculty of Economics and Management, SPU in Nitra]. *Pedagogika*, 6, 24-43.
- Vančíková, K. (Ed.) (2013). *Multikultúrna výchova – jej miesto v príprave učiteľov*. [Multicultural education – its role in teacher preparation]. Banská Bystrica: Faculty of Education, MBU.
- Zelenková, A. (2010). *Interkultúrne vzdelávanie v cudzích jazykoch na vysokej škole: Metódy a ich reflexia*. [Intercultural education in foreign languages at university: Methods and their reflection]. Banská Bystrica, SK: Faculty of Economics, MBU.
- Zerzová, J. (2018). Opportunities to Develop Intercultural Communicative Competence in Czech lower-secondary schools: Findings of the IRSE Video Study of German. *JoLaCe*, 6(3), 101-121.

Contact

Doc. PhDr. Anna Zelenková, PhD.

Matej Bel University

Faculty of Economics

Tajovského 10

975 90 Banská Bystrica

Slovakia

anna.zelenkova@umb.sk

Prof. PaedDr. Dana Hanesová, PhD.

Matej Bel University

Faculty of Education

Ružová 13

974 11 Banská Bystrica

Slovakia

dana.hanesova@umb.sk



DOI: 10.2478/jolace-2019-0002

EFL Teachers' Moral Dilemma and Epistemic Beliefs

Amin Karimnia & Meisam JamadiIslamic Azad University, Iran
aminkarimnia@yahoo.com

Abstract

This study investigated the relationship between English teachers' epistemological beliefs and moral dilemma. In doing so, 70 English teachers were selected from different language institutes and were included in the research sample. The instruments used to collect the data included the Schommer Epistemological Questionnaire (SEQ) and the Defining Issues Test (DIT). The collected data were analyzed using Pearson Product Moment Correlation method and descriptive statistics in SPSS software. The findings revealed that the participants believed that knowledge improves with experience over time, and that there was also an innate ability to acquire knowledge. They also displayed conflicting views about the simplicity/complexity of knowledge. The analysis of different stages of moral development in the views of the English teachers showed an ascending trend in the moral development from stage 2 (the focus on personal interests) through stage 6 (appeal to intuitive moral principles/ideals). Besides, significant differences were found among different stages of moral development as assessed by the EFL teachers and also in terms of the impact of different moral reasoning schemas on the participants when making judgments about different moral dilemmas.

Key words: epistemology, epistemic beliefs, moral reasoning/dilemma, foreign language teaching

Introduction

A number of studies have established a connection between teachers' beliefs about knowledge and their teaching practices (Chen, Morris, & Mansour, 2015; Çetin-Dindar, Kirbulut, & Boz, 2014; Mansour, 2013; Chai et al., 2006; Deniz, 2011). The analysis of epistemic beliefs within teacher education programs and their development is highly important, as these beliefs affect students' and instructors' academic performance (Balakrishnan & Narvaez, 2016; Sanger, 2008). Research shows that people's epistemic beliefs affect their motivational beliefs including the way they employ learning strategies, regulate their academic performance, and show consistent behaviors in self-regulatory and achievement-oriented procedures (Schommer et al., 2000; Topcu, 2011; Ozgelen, 2012).

An equally important variable that may be influenced by epistemological beliefs is moral reasoning. Moral reasoning is a capacity that enables us to think

consciously and deliberately about morality; it involves thinking with moral considerations that often lead to a moral conclusion (Saunders, 2015). Moral conflicts are also defined as including those situations in which a person's moral perspective may be sensibly interpreted as directing the person to perform two incompatible actions (Dwyer, 2009; Haidt & Bjorklund, 2008a; Horgan & Timmons, 2007).

To clarify the moral challenges, a teacher may face two situations: first, there are cases where a teacher has difficulty in deciding how to deal with the students. The conflict includes teacher's decisions about punishing a particular student. In this situation, a student is disturbing the class and the teacher makes a quick decision to ask the student to leave the class to maintain the peaceful environment for the rest of the students. The teacher is concerned about the appropriate way of doing this and his/her way of dealing with this particular student. Another situation is what has happened to one of the authors of the present study. He remembers a situation from some years ago in which he had problems in deciding between two grades for an academically weak student. He decided to give the student a failing grade, and he is still concerned about the effects of his decision on that student.

There is no single right or wrong way to handle situations such as the ones described above; we only wish to argue that they can be best conceptualized in terms of the tensions of morality and power that are unavoidably inherent in the exercise of authority. These tensions can never be resolved; they present constant difficult choices to the teachers, and each time they arise they should be dealt with in a new or different way in complex and ambiguous moral contexts in which decisions are rarely easy or straightforward (Hart, Matsuba & Atkins, 2014; Gibbs, 2013; Paxton, Ungar & Greene, 2011).

The purpose of this study is (a) to investigate types of epistemological beliefs (omniscient authority, simple knowledge, etc.) in a sample of EFL teachers; (b) and to find the relationship between their epistemological beliefs with their moral reasoning.

2 Literature review

2.1 Epistemological beliefs

Epistemological beliefs are those beliefs that are concerned about "the nature of knowledge and learning" (Schommer, 1980, p. 78). Studies concerned with teachers' epistemological beliefs (Chan, 2004; Chan & Elliott, 2004; Cheng, Chan, Tang, & Cheng, 2009; Deniz, 2011; Kang, 2008; Ozgelen, 2012) often make use of Schommer's model. In the 1980s, Schommer integrated epistemological dimensions and developed a system of independent beliefs, in which a number of beliefs were supposed to frame the individuals' personal epistemology. It is also considered that one's epistemological beliefs can evolve and refine over time.

This accounts for why there are contradictory beliefs among people concerning the nature of knowledge. For instance, some individuals may consider knowledge to include isolated pieces of information, while others may hold the belief that the deep learning of knowledge is a gradual process. Many scholars (Gill, Ashton & Algina, 2004; Horgan & Timmons, 2007)) have addressed how epistemological beliefs are correlated with psychological processes, such as mathematics instruction and learning.

Epistemological beliefs and the learning approach have also been studied in terms of five epistemic dimensions as measured through the Epistemological Beliefs Inventory (EBI) (Bendixen et al., 1998). These dimensions include (a) simple knowledge (knowledge consists of concrete facts); (b) certain knowledge (absolute knowledge exists and must be discovered); (c) omniscient authority (authorities have access to otherwise inaccessible knowledge); (d) quick learning (learning occurs in a quick or not-at-all fashion); and (e) fixed ability (the ability to acquire knowledge is innate or genetically determined).

2.2 Moral reasoning

Recent decades have witnessed a growing interest in the moral domain of teaching among educational researchers and teacher educators (Balakrishnan & Narvaez, 2016). The moral dimension of teaching might become more concrete when a teacher faces a conflict in his professional conduct. Many educational conflicts require decision making from a teacher.

Different scholars assume that teaching is essentially and fundamentally a moral enterprise (Campbell, 2014; Campbell, 2008; Sanger, 2008). How a teacher cares for students is thought to be among the most important of all professional matters. Moreover, morality is at the heart of the teacher's disciplinary knowledge, that knowing a discipline is not merely a matter of cognitive attainment but an ethical achievement, a matter of having embraced a set of values characteristic of preferred modes of inquiry. To teach is to be embedded in a world of uncertainty and of hard choices, what a teacher does and how he or she thinks is morally laden (Levin, 2015; Hansen, 2001).

Conflicts among values, norms, and beliefs, pervade teaching; some originating in the way in which teaching is structured and in how authority is understood and enacted and in the sometimes competing interests of teachers, students, and their parents (Noddings, 2002). Teachers understand and respond to these conflicts differently. Based upon a wide range of life experience, patterns are apparent in how teachers respond to moral dilemmas, indicating differences in levels of moral and ethical sensitivity and understanding (Rabin & Smith, 2013; Carr, 2000).

3 Research questions

As was mentioned earlier, the present study aimed to explore Iranian English teachers' epistemological beliefs and moral reasoning and to find any relationship between these two variables. To achieve this purpose, two main questions guided the study:

- What types of epistemological beliefs (omniscient authority, simple knowledge, certain knowledge, innate ability, or quick learning) do English teachers exhibit?
- What is the relationship between English teachers' epistemological beliefs and their moral reasoning?

4 Method

The main objective of this study was to address Iranian English teachers' epistemological beliefs and moral reasoning. To this end, a survey methodology was used to determine the types of epistemological beliefs held by Iranian EFL teachers and the correlation between their epistemological beliefs and moral reasoning. This section describes the procedures taken to conduct this study.

4.1 Participants

Based on the convenient sampling procedure, 70 Iranian English teachers were selected as participants from different language institutes in three cities in Iran (Bandar-Abbas, Shiraz and Fasa). All participants were native Iranian English teachers at elementary, intermediate and advanced levels at the time this study was conducted. The participants were aged 26.5 years on average, while the youngest one was 25 and the oldest 34, and all of them had at least three years of teaching experience. The most experienced one had 8 years of experience.

4.2 Instruments

Two instruments were used to collect the quantitative data: the Schommer Epistemological Questionnaire (SEQ) and the Defining Issues Test (DIT), which was developed based on the Kohlberg's moral reasoning theory and included six stages of moral development. To collect the qualitative data, the studies conducted by Schommer (1990) and Cheng et al. (2009) were used to design an epistemological beliefs interview protocol. Then semi-structured interviews were conducted. Eight English teachers were conveniently selected for the interview. Each interview was audio-recorded and transcribed word for word for further analysis.

4.3 Data collection and analysis

Initially, Schommer Epistemological Questionnaire (SEQ, 1989) was distributed among the participants to evaluate their epistemological beliefs. To this end, the participants were asked to evaluate 63 statements about the nature of learning and knowledge using a five-point scale from 1 (*strongly disagree*) to 5 (*strongly agree*). Depending on the score an individual received in the survey, his/her simplicity or sophistication of beliefs was decided. The SEQ consisted of 5 dimensions, including omniscient authority, simple knowledge, certain knowledge, innate ability, and quick learning. The second instrument, the Defining Issues Test (DIT) that was developed based upon the Kohlberg's (1971) moral reasoning theory, includes six stages of moral development. The participants were asked to read a story including a moral dilemma and then were required to make a judgment about this dilemma. Each case included one dilemma that was followed by 12 statements.

The statements were assessed based on a five-point Likert scale. The 12 statements for each story represented different stages of moral development. Some solutions regarding these dilemmas were assumed to represent different levels of moral reasoning. Percentage scores were derived from participants' responses to the 12 statements by calculating the ratio of their selection of statements. Upon the administration of the questionnaires, the participants' responses were scored and codified for data analysis. In order to find out if a relationship existed between the two research variables, Pearson Product Moment Correlation method was run. To analyze the quantitative data, descriptive statistics including mean and standard deviations were calculated using SPSS software.

5 Results

5.1 Types of epistemological beliefs exhibited by EFL teachers

The first objective of the present study was to identify types of epistemological beliefs (omniscient authority, simple knowledge, certain knowledge, innate ability, or quick learning) exhibited by the Iranian English teachers under study. Nine items in the Schommer Epistemological Questionnaire (8, 47, 55, 57, 4, 15, 25, 28, and 62) measured the Iranian English teachers' views about the ability to learn. Lower values on this scale would indicate that the individual believed in the fixity of knowledge at birth, while higher values would show the individual's idea that knowledge improved with experience and over time. Table 1 presents the descriptive statistics concerning the participants' views about the ability to learn:

Table 1: Descriptive Statistics for the Participants' Views About the Ability to Learn

Scale 1	Min	Max	Mean	Distribution				
				Below	the	Mean	Above	the
				mean			mean	
Innate ability	22.00	36.00	29.1857	45.7%		14.3%	40%	

As it is shown in Table 1, participants' scores on the first scale in the questionnaire (innate ability) ranged from 22 to 36 (out of 45). Their mean score was 29.18. This showed that the participants generally believed that knowledge would improve with experience and over time. The distribution of the participants' scores also indicated that 45.7% of the participants scored more than one standard deviation below the mean, while 40% of them scored more than one standard deviation above the mean. The values implied that 45.7% of the participants believed in the innate ability to acquire knowledge, while 40% of them contended that knowledge improved over time as an individual gained more experienced. However, the remaining 14.3% who scored one standard deviation either below or above the mean expressed neutral views in this regard. The second scale in the questionnaire (including items 11, 16, 17, 19, 22, 23, 33, 56, 58, and 59) measured the participants' attitudes with regard to the structure of knowledge (simple knowledge), as shown in Table 2:

Table 2: Descriptive Statistics for the Participants' Views about the Structure of Knowledge

Scale 2	Min	Max	Mean	Distribution				
				Below	the	Mean	Above	the
				mean			mean	
Structure of knowledge	24.00	37.00	29.2000	44.3%		12.9%	42.80%	

The participants' scores on the second scale demonstrated a very close pattern to their scores on the first scale. As it can be seen, the scores of the participants on the second scale in the questionnaire (simple knowledge) varied from 24 to 37 (out of 50), with a mean score of 29.2. Participants with lower

values on this scale maintained that knowledge was simple and based on isolated facts. In contrast, those with higher values held the belief that knowledge was more complex and composed of highly interrelated facts. Accordingly, it can be suggested that the participants on the average believed that knowledge had a complex nature and was made of highly interrelated facts. Furthermore, the distribution of the participants' scores showed that 44.3% of the participants held the belief that knowledge was simple and based on isolated facts. Yet, 42.80% of them considered knowledge to be a complex entity with many interrelated facts. Nevertheless, 12.9% of the participants were undecided with regard to the two extremes. Table 3 illustrates the participants' attitudes towards the speed of learning (quick learning) as measured through items 1, 10, 30, 39, 50, 60, 20, 24, and 52 in the questionnaire:

Table 3: Descriptive Statistics for the Participants' Views About the Speed of Learning

Scale 3	Min	Max	Mean	Distribution			
				Below the mean	the Mean	Above the mean	the
Speed of learning	21.00	45.00	28.9571	38.6%	24.3%	37.1%	

As Table 3 shows, the participants' scores on the third scale in the questionnaire (speed of learning) ranged from 21 to 45 (out of 45), with a mean score of 28.95. Lower values on this scale would unveil the belief that learning was quick, and higher values were associated with the belief that learning was gradual and could be improved over time. As was the case with the two other scales discussed above, the participants generally maintained that learning could both a matter of quick processing and a gradual processing (improvable over time). The distribution of the participants' scores across this scale showed that 38.6% of the participants supported the view that learning was a quick process that would occur immediately, whereas 37.1% of them considered knowledge learning as a gradual process that would improve over time. In addition, 24.3% of the participants did not express a clear-cut decision about the speed of learning. Table 4 reports the participants' attitudes towards the stability of knowledge (certain knowledge), which was assessed through items 2, 12, 21, 34, 48, and 61 in the questionnaire:

Table 4: Descriptive Statistics for the Participants' Views about the Stability of Knowledge

Scale 4	Min	Max	Mean	Distribution		
				Below the mean	Mean	Above the mean
Stability of knowledge	15.00	32.00	19.2857	57.1%	11.4%	31.5%

As shown in Table 4, the participants' scores on the fourth scale in the questionnaire concerning the stability of knowledge varied from 15 to 32 (out of 32), with a mean score of 19.28. Participants with lower values on this scale advocated that knowledge involved absolute facts and that it was unchanging. In contrast, higher values showed the belief that knowledge is not absolute and certain. These figures generally indicated that the participants in this study favored generally the view that knowledge was composed of absolute facts rather than a tentative entity.

This is shown by the way the participants' scores were distributed across the knowledge stability continuum. As it can be seen, 57.1% of the participants supported the view that knowledge consisted of absolute facts, whereas only 31.5% of them considered knowledge to be a tentative entity. Furthermore, 11.4% of the participants supported neither of the extremes, adopting a neutral position concerning the stability of knowledge. The participants' attitudes towards the source of knowledge (omniscient authority) were assessed through items 13, 27, 3, 5, 7, 36, 40, and 46 in the questionnaire (see Table 5):

Table 5: Descriptive Statistics for the Participants' Views about the Source of Knowledge

Scale 5	Min	Max	Mean	Distribution		
				Below the mean	Mean	Above the mean
Source of knowledge	18.00	31.00	24.0429	37.1%	20%	48.3%

Participants' scores on the fifth scale concerning the source of knowledge ranged from 18 to 31 (out of 40), and their mean score was 24.04. Lower values

on this scale were in favor of the belief that knowledge was handed down by authority (37.1%), while higher values emphasized that knowledge was acquired through reason or logic (48.3%). Moreover, 20% of the participants were neutral in their views about the source of knowledge. Accordingly, it can be said that almost half of the participants in this study supported the view that knowledge could be acquired through reason or logic, as opposed to authority.

In order to see if there were any significant differences among the Iranian EFL teachers in terms of their types of epistemological beliefs, one-way ANOVA was conducted (see Table 6):

Table 6: Results of ANOVA test for differences in the participants' epistemological beliefs

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	5456.874	4	1364.219	171.035	.000
Within Groups	2751.814	345	7.976		
Total	8208.689	349			

As the results of one-way ANOVA suggested, there were significant differences among the participants concerning their different types of epistemological beliefs ($P < 0.01$).

4.2 The Relationship between English Teachers' Epistemological Beliefs and Their Moral Reasoning

The second objective of the present study was to explore the relationship between Iranian English teachers' epistemological beliefs and their moral reasoning. To this end, the participants' responses to the items in the DIT were analyzed. The test shows different stages of moral development: (a) stage 2 was focused on the personal interests of the actor making the moral decisions; (b) stage 3 represented the focus on maintaining friendships, good relationships, and approval; (c) stage 4 addressed the tendency to maintain the existing legal system, rules, and formal organizational structure; (d) stage 5 measured the appeal to majority while maintaining minority rights; (e) and stage 6 presented the focus on appeal to intuitive moral principles/ideals. Table 7 shows the descriptive statistics for different stages of moral development among the participants in this study:

Table 7: Descriptive Statistics for Different Stages of Moral Development

Stage	Min	Max	Mean	Std. Deviation
Stage 2	15.00	23.00	18.9000	2.23380
Stage 3	21.00	55.00	26.7143	4.09716
Stage 4	25.00	33.00	29.3286	1.90895
Stage 5	24.00	32.00	27.7000	2.14239
Stage 6	30.00	45.00	37.8000	3.41183

As the mean scores suggested, there was an ascending trend in the moral development of the participants through the movement from stage 2 to stage 6. This ascending trend was interrupted in stage 5 but it kept on moving to stage 6. This showed that the participants in this study were less concerned about their personal interests (18.90) when making moral judgments (as represented in stage 2). In their moral judgments, they were more or less influenced by maintaining relationships (26.71), maintaining the existing legal system, rules, and formal organizational structure (29.32), and the focus on appeal to majority while maintaining minority rights (27.70). However, they were mainly concerned about appeal to intuitive moral principles/ideals as was shown in stage 6 of moral development (with a mean score of 37.80). In order to find any significant differences among these different stages of the participants' moral development, one-way ANOVA was conducted (see Table 8).

As it is evident, there were significant differences among different stages of moral development ($p < 0.01$). In order to discover any relationship between Iranian English teachers' epistemological beliefs and their moral reasoning, Pearson correlation test was run, as shown in Table 9.

The participants' personal interest schema was negatively correlated with most scales of epistemological beliefs except for scale 4 (stability of knowledge). However, the values of these correlations suggested that there were weak correlations between the personal interest schema and different scales of epistemological beliefs ($P > 0.05$), except for scale 5 (source of knowledge), which showed a significant negative correlation with the personal interest scale ($P < 0.05$).

Table 8: Results of ANOVA for Differences in Moral Development Stages

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	12762.326	4	3190.581	383.013	.000
Within Groups	2873.929	345	8.330		
Total	15636.254	349			

Table 9: Correlations between Epistemological Beliefs and Moral Reasoning

Schemas		Scale 1	Scale 2	Scale 3	Scale 4	Scale 5
		Innate ability	Structure of knowledge	Speed of learning	Stability of knowledge	Source of knowledge
Personal interests	Pearson Correlation	-.033	-.100	-.162	.085	-.448*
	Sig. (2-tailed)	.784	.412	.180	.482	.038
	N	70	70	70	70	70
Maintaining norms	Pearson Correlation	.232	-.034	.076	-.004	.120
	Sig. (2-tailed)	.053	.780	.530	.973	.321
	N	70	70	70	70	70
Post-conventional	Pearson Correlation	-.106	.102	-.173	-.136	-.137
	Sig. (2-tailed)	.384	.403	.153	.263	.258
	N	70	70	70	70	70

5 Discussion

The categories of epistemological beliefs displayed by the EFL teachers in the present study (omniscient authority, simple knowledge, certain knowledge, innate ability, or quick learning) were similar to those recognized in previous studies (e.g. Topcu, 2011; Baxter Magolda, 1993). Concerning the structure of knowledge, the English teachers again showed conflicting views, as some of them held the belief that knowledge was simple and based on isolated facts, while some considered knowledge to be a complex entity with many interrelated facts. This observation was also supported by Brownlee (2001).

Previous studies show that moral and epistemological developments are two important aims of teacher education (Ozgelen, 2012; Deniz, 2011; Topcu, 2011). Different educational courses are needed to develop teachers' epistemological beliefs and moral reasoning in teacher education programs. However, in the current teacher education program in Iran, there are no courses which explicitly include epistemological and moral issues. There is a lack of both theoretical courses (including information and explanations of epistemology and morality) and practical courses. Teachers observe their mentors and teach subject knowledge to the students, but they do not consider and discuss any epistemological or moral issues from their student teaching experience in practice teaching courses.

6 Conclusion

The findings of the study about the ability to learn, as a component of the English teachers' epistemological beliefs, showed that the teachers generally believed in the two extremes of this scale, suggesting that knowledge both improves with experience and over time and there is an innate ability to acquire knowledge. This finding is in line with the results of previous studies including Brownlee's (2001) who showed that pre-service teacher students' epistemological beliefs ranged from naive beliefs in the reception of absolute truths to more sophisticated beliefs in the construction of reasoned truths.

Surveying the English teachers' attitudes towards the speed of learning showed that their opinions were distributed almost all across the speed of learning continuum. This was also the case with their views about the stability of knowledge and in general different types of epistemological beliefs. It was also found that there were significant differences among different stages of moral development. Similarly, there were significant differences among the English teachers in terms of the influence of different moral reasoning schemas on them when making judgments about different moral dilemmas. These findings may point to an underlying tradition-versus-modernity conflict in the Iranian education system.

Therefore, authorities in the field of teacher education need to pay more attention to language teachers' epistemological beliefs and raise their awareness in this regard so that teachers can come up with more sophisticated beliefs. Despite all these advantages, however, the relationship between personal epistemology and morality in an educational context cannot always define the ultimate process of decision-making. The results in this study, for instance, revealed a spectrum of (usually conflicting) epistemic and moral possibilities. From a larger perspective, any education system itself rests on its specific epistemology, which may impose institutional conventions on lower strata of the system, thus engendering other possible conflicts in decision-making. A question

to be addressed in future studies is the way intellectual agents (e.g. teachers) respond to higher levels of institutionally conventionalized knowledge and moral action.

From a global perspective, too, experiences in education can help teachers or decision-makers re-examine their beliefs and epistemological development (Brownlee, 2001). This developmental process, of course, is not limited to agents in any education system, but it should be extended to the learners as well. Regardless of students' epistemology level, instructors should respect learners' assumptions about knowledge and provide appropriate feedback to foster the learning process. The consequences of epistemological beliefs are, however, subtle since many of their effects are mediated by other variables (Cano, 2005). For instance, if learners believe that knowledge is structured as isolated facts, they will be likely to study by memorizing lists of concepts. A change in the belief system, then, can bring about effects in the learning process.

Furthermore, because moral reasoning determines how individuals react to a moral dilemma, educators must specifically focus on the impact of education on moral reasoning. While professional companies, organizations and institutes work based on codes of conduct/ethical guidelines to help their employees resolve moral dilemmas, teachers, on the other hand, have to prepare the initial grounds for learners to be conscious of the overall structure of moral action and to make them aware of the fact that moral judgment is somehow mediated by personal judgment. This understanding could help learners develop a critical approach to moral decisions.

Decision-makers in the field of teacher education can use these findings to improve their teacher development/training programs, helping teachers to develop their epistemological beliefs and moral reasoning up to higher stages. In addition, EFL teachers are encouraged to reflect upon their beliefs about the nature and sources of knowledge, refining such beliefs if necessary. Using the findings of this study can help EFL teachers to develop their epistemological beliefs and moral reasoning, so that they can influence learners' motivation and their learning outcomes more effectively.

References

- Balakrishnan, V., & Narvaez, D. (2016). A reconceptualisation of Vygotsky's ZPD into ZCD in teaching moral education in secondary schools using real-life dilemmas. *Cogent Education*, 3(1), 1–15.
- Baxter Magolda, M.B. (1993). *The convergence of rational and interpersonal knowing in young adults' epistemological development*. Paper presented at the Annual Meeting of the American Educational Research Association, Atlanta.
- Bendixen, L. D., Schraw, G., & Dunkle, M. E. (1998). Epistemic beliefs and moral reasoning. *The Journal of Psychology*, 132(2), 187–200.

- Brownlee, J. (2001). Knowing and learning in teacher education: A theoretical framework of core and peripheral epistemological beliefs. *Asia Pacific Journal of Teacher Education & Development*, 4(1), 67-190.
- Campbell, E. (2008). The ethics of teaching as a moral profession. *Curriculum Inquiry*, 38 (4), 357-385.
- Campbell, E. (2014). Teaching ethically as a moral condition of professionalism. In *Handbook of moral and character education*, 2nd ed., edited by L. Nucci and D. Narváez, 101-118. New York: Routledge.
- Cano, F. (2005). Epistemological beliefs and approaches to learning: Their change through secondary school and their influence on academic performance. *British Journal of Educational Psychology*, 75, 203-221.
- Carr, D. (2000). *Professionalism and ethics in teaching*. London: Routledge.
- Chan, K. (2004). Pre-service teachers' epistemological beliefs and conceptions about teaching and learning: Cultural implications for research in teacher education. *Australian Journal of Teacher Education*, 29. doi:10.14221/ajte.2004v29n1.1.
- Chan, K.W. & Elliot, R.G. (2004). Relational analysis of personal epistemology and conceptions about teaching and learning. *Teaching and Teacher Education*, 20, 817-831.
- Çetin-Dindar, A., Kirbulut, Z. D., & Boz, Y. (2014). Modelling between epistemological beliefs and constructivist learning environment. *European Journal of Teacher Education*, 37, 479-496.
- Chai, C. S., Khine, M. S., & Teo, T. (2006). Epistemological beliefs on teaching and learning: A survey among pre-service teachers in Singapore. *Educational Media International*, 43, 285-298. <http://dx.doi.org/10.1080/09523980600926242>
- Chen, J. A., Morris, D. B., & Mansour, N. (2015). Science teachers' beliefs: Perceptions of efficacy and the nature of scientific knowledge and knowing. In H. Fives & M. G. Gill (Eds.), *International handbook of research on teachers' beliefs* (pp. 370-386). New York, NY: Routledge.
- Cheng, M. M. H., Chan, K., Tang, S. Y. F., & Cheng, A. Y. N. (2009). Pre-service teacher education students' epistemological beliefs and their conceptions of teaching. *Teaching and Teacher Education*, 25, 319-327.
- Deniz, H. (2011). Examination of changes in prospective elementary teachers' epistemological beliefs in science and exploration of factors mediating that change. *Journal of Science Education and Technology*, 20, 750-760. <http://dx.doi.org/10.1007/s10956-010-9268-x>
- Dwyer, S. (2009). Moral dumb founding and the linguistic analogy: Methodological implications for the study of moral judgment. *Mind & Language*, 24(3), 274-296.
- Ferda Bedel, E. (2012). An examination of locus of control, epistemological beliefs

- and metacognitive awareness in preservice early childhood teachers. *Educational Sciences: Theory & Practice*, 3051-3060.
- Gibbs, J. C. (2013). *Moral development and reality: Beyond the theories of Kohlberg, Hoffman, and Haidt*. Oxford University Press.
- Gill, M., Ashton, P. & Algina, J. (2004). Changing preservice teachers' epistemological beliefs about teaching and learning in mathematics: An intervention study. *Contemporary Educational Psychology*, 29(2), 164–185.
- Haidt, J., & Bjorklund, F. (2008a). Social intuitionists answer six questions about morality. In W. Sinnott-Armstrong (Ed.), *Moral psychology: The cognitive science of morality: Intuition and diversity* (Vol. 2, pp. 181–218). Cambridge, MA: MIT Press.
- Hansen, D. T. (2001). *Exploring the moral heart of teaching: Toward a teacher's creed*. New York, NY: Teachers College Press.
- Hart, D., Matsuba, K., & Atkins, R. (2014). The moral and civic effects of learning to serve. In L. Nucci, D. Narvaez, & T. Krettenauer (Eds.), *Handbook on moral and character education* (2nd ed., pp. 456–470). New York, NY: Routledge.
- Horgan, T., & Timmons, M. (2007). Morphological rationalism and the psychology of moral judgment. *Ethical Theory and Moral Practice*, 10, 279–295.
- Kang, N. (2008). Learning to teach science: Personal epistemologies, teaching goals, and practices of teaching. *Teaching and Teacher Education*, 24, 478–498. <http://dx.doi.org/10.1016/j.tate.2007.01.002>
- Kohlberg, L. (1971). From is to ought: How to commit the naturalistic fallacy and get away with it in the study of moral development. In T. Mischel (Ed.), *Cognitive development and epistemology* (pp. 151–284). New York: Academic Press.
- Levin, B. (2015). Development of teachers' beliefs. In H. Fives & M. G. Gill (Eds.), *International handbook of research on teachers' beliefs* (pp. 48–65). New York, NY: Routledge.
- Mansour, N. (2013). Consistencies and inconsistencies between science teachers' beliefs and practices. *International Journal of Science Education*, 35, 1230–1275.
- Noddings, N. (2002). *Educating moral people: A caring alternative to character education*. New York, NY: Teachers College Press.
- Ozgelen, S. (2012). Exploring the relationships among epistemological beliefs, metacognitive awareness and nature of science. *International Journal of Environmental & science Education*, 7, 409–431.
- Paxton, J. M., Ungar, L., & Greene, J. D. (2011). Reflection and reasoning in moral judgment. *Cognitive Science*, 36 (1), 163–177.
- Rabin, C., & Smith, G. (2013). Teaching care ethics: conceptual understandings and stories for learning. *Journal of Moral Education*, 42, 164–176.

- Sanger, M. N. (2008). What we need to prepare teachers for the moral nature of their work. *Journal of Curriculum Studies*, 40 (2), 169–185.
- Saunders, L. (2015). What is moral reasoning? *Philosophical Psychology*, 28 (1), 1-20, DOI: 10.1080/09515089.2013.801007
- Saylan, A., Armağan, F. O., & Bektaş, O. (2016). The relationship between pre-service science teachers' epistemological beliefs and preferences for creating a constructivist learning environment. *European Journal of Science and Mathematics Education*, 4(2), 251-267.
- Schommer, M. (1990). Effects of beliefs about the nature of knowledge on comprehension. *Journal of Educational Psychology*, 82(3), 498-504.
- Schommer, M. (1998). The influence of age and education on epistemological beliefs. *British Journal of Educational Psychology* 68, 551-562.
- Topcu, M. S. (2011). Turkish elementary student teachers' epistemological beliefs and moral reasoning, *European Journal of Teacher Education*, 34 (1), 99-125.

Contact

Department of English
Fasa Branch
Islamic Azad University
Iran
aminkarimnia@yahoo.com



DOI: 10.2478/jolace-2019-0003

The Use of Hedging in Research Articles on Applied Linguistics

Inna Livytska

Volodymyr Vynnychenko Central Ukrainian State Pedagogical University, Ukraine
inna.livytska@gmail.com

Abstract

This paper is devoted to the analysis of the use of hedging in a corpus of articles from applied linguistics, and in this sense, it is complementary to the previous research of academic persuasion in research articles (Hinkel, 1997; Hyland, 1996, 2004). This study examined the types and frequency of hedges employed by the authors of academic research articles (RAs) in the field of applied linguistics. A corpus consists of 20 research articles, randomly selected from the Open Access Journals on Educational linguistics (5 RAs), Psycholinguistics (5 RAs), Sociolinguistics (5 RAs) and Pragmatics (5 RAs). The data were manually coded according to Hyland's taxonomy of hedges and hedging devices (Hyland, 1996) and then formatted to calculate the frequency and type of hedges in RAs on Applied Linguistics. Results of the study indicate that reader-oriented hedges constitute the main pragmatic type of hedges in RAs in the field of applied linguistics, recognizing the need for reader's ratification of the author's claims and politeness conventions of academic discourse per se. Combination of qualitative and quantitative methods applied to computer readable data proved that hedges in RAs on Applied Linguistics are topic dependent, showing differences in typology, frequency and distribution even within one discipline.

Key words: hedging; metadiscourse; academic writing; research article; persuasion; interactional resources

Introduction

Academic writing is characterized by the objective representation of knowledge, where authors try to place his/her new scientific work into the existing bulk of the research, drawing on interpersonal and ideational resources. However, it has been universally accepted, that communicating new knowledge in a genre (e.g., of the research article) meets the requirements of a disciplinary discourse and its readership is a complex task. This can be possibly achieved through the use of modality, first-person pronouns and attribution (Myers, 1989), or stance adverbs (Biber, 1988; Çakır, 2016). Other authors concentrate more on the persuasive function of metadiscourse (Mauranen, 1993; Hyland, 1998 and 2005, p. 63-71; Hyland, 2017), analyzing the use of metadiscourse markers for rendering propositional meaning. The degree of strength in expressing

propositional meaning can be modified with the help of lexico-grammatical features, stating conviction, tentativeness, and certainty on the part of academic writers (boosters and hedges are among them).

A bulk of research on hedging has proved some differences in their use and distribution in RAs. Nelson and Castello (2012), tracing the formation of a writer's identity in social sciences, point out that metadiscourse shows significant differences across disciplines and across national, linguistic, and cultural traditions. On the contrary, recent contrastive research of native English writers and non-native English writers witnessed that different cultures may sometimes show similar metadiscoursal patterns in academic writing (Blagojevic, 2004). General claims, regarding voice representation differences, concern the number of discourse markers in "hard" and "soft" sciences, e.i. articles from the natural sciences tend to include fewer metadiscourse markers than those from social sciences and humanities (Hyland, 2008; Vazquez&Giner, 2009). Another point for the difference is that more advanced practitioners of any discipline ("hard" or "soft" sciences) employ metadiscourse to a greater extent than the less advanced (Hyland, 2004), underpinning the differences in academic voice realization by novice and experienced writers etc.

One more controversy in this study concerns the theoretical ambiguity of metadiscoursal markers: hedges and boosters. Literature regarding boosters and hedges doesn't show great differentiation between these two terms (Grabe & Kaplan, 1996, p. 155). According to Hyland (1998, p. 238), boosters and hedges are two metadiscourse markers of credibility, helping authors to negotiate their claims in academic writing. But unlike boosters, which strengthen the illocutionary force of the utterance, hedges act like *downtoners* (Holms, 1984) showing the degree of author's detachment (Vassileva, 2001). Thus, in this study, we will follow the view of Vassileva (2001, p. 85), on *boosters* as interpersonal means of expressing author's commitment to the utterance, and *hedges* as interpersonal means of expressing author's detachment.

Investigation of cultural aspect of persuasion tends to be subjective and presupposes a turn to contrastive rhetoric framework, stating that different languages and writing traditions exhibit considerable variation in respect of academic writing, which may lead to cross-cultural misunderstanding and endanger scientific communication (see Clyne, 1991; Kreutz & Harres, 1997; Vassileva, 1997; Ventola, 1997 to mention some).

Therefore, in this paper we view hedges/hedging as a pragmatic concept, adhering to pragmatic side of the issue of politeness and linking it to politeness phenomena, mitigation, vagueness and modality (Markkanen & Schröder, 1997, p. 249). Moreover, pragmatic side provides us with a more varied spectrum of means for written identity analysis, involving metadiscoursal markers of the interactive and interactional level (Hyland, 2005).

Method

In this paper we will try to utilize Hyland's framework of metadiscourse, mainly his taxonomy of hedges (1996) with the purpose to define types of hedges and their frequency of use in research articles on applied linguistics across four related fields of applied linguistics (i.e., educational linguistics, psycholinguistics, sociolinguistics and pragmatics). To this purpose, a corpus of 20 research articles was analyzed for exploring forms and functions of hedges. The frequencies of occurrence of the different hedging devices were calculated. The forms and functions of hedges were analyzed on the basis of Hyland's (1996) model respectively. The main criteria for referring a linguistic or syntactic device to a hedge was Crompton's test (1997, p. 282): if the proposition can be restated in such a way that it is not changed but that the author's commitment to it is greater than at present, then the proposition is hedged.

The paper is structured as follows. First, we will provide an overview of hedging in academic writing in general, and then will refer to Hyland's taxonomy of hedges (1996) and categorization of hedges in non-factive scientific statements in research articles. Further on we will present results and discussion of types and frequency of hedges in research articles on applied linguistics and end up with the conclusions and implications for future research.

Hedging in academic writing

Since Lakoff (1972) introduced the notion of hedges into linguistics by defining them as "words whose job is to make things fuzzier or less fuzzy" (Lakoff, 1972, p. 195), hedges have been given different definitions by different researchers (Crompton, 1997; Hyland, 1996, 1998; Myers, 1989; Salager-Meyer, 1994, 1997). Hyland (1998) suggested that in academic writing, hedges "imply that a statement is based on plausible reasoning rather than certain knowledge, and allow readers the freedom to dispute it" (Hyland, 1998, p. 4).

Creation of knowledge is formed by four elements of communication: writer, audience (reader), language and reality (context). Writers are presenting a paper with conviction and at the same time, are trying to consider the role of the reader in accepting knowledge (Hyland, 1996). Thus, hedges enable writers to appropriately modulate their claims as well as to give room for the reader to participate in a virtual dialogue.

An increasing number of research studies on a variety of disciplines (see, for example Hyland, 1994, 1996, 1998, 2000; Salager-Meyer, 1991, 1994; Skelton, 1997; Meyer, 1997; Lewin, 1998) has been able to demonstrate how academic discourse is structured to accomplish rhetorical objectives. Myers (1985; 1989) suggested that hedges are part of a wider system of politeness, designed to avoid the certainty of claims, challenging existing assumptions.

Literature overview of interpersonal devices revealed some characteristics of hedging in textbooks (Myers, 1992), science abstracts (Rounds, 1982), and natural science research articles (Vazquez & Giner, 2009). However, hedging in research articles (RA) on applied linguistics within four subfields (educational linguistics, psycholinguistics, sociolinguistics, and pragmatics) represents a little-studied area of pragmatics and needs more attention in terms of its functions and peculiarities of use. Some known influential approaches to metadiscourse markers classification are briefly summarized in Table 1 below.

Table 1: Taxonomies regarding metadiscourse markers in academic writing

Skelton's (1988)	Myer's (1989)	Salager-Meyer's (1994)	Salager-Meyer's (1997)	Hyland's(1996)
Copulas other than be Lexical commenting verbs All modal verbs	Subject complements other than be Lexical verbs Modal verbs of condition Probability adverbs	Shields Approximators Expressions of the author's personal doubt and direct involvement Emotionally charged intensifiers	Modal auxiliary verbs Modal lexical verbs Adjectival, adverbial and nominal modal phrases Approximators of degree, quantity, frequency and time Introductory phrases If-clauses Compound hedges	Attribute-hedges Reliability hedges Writer-oriented hedges Reader-oriented hedges

Following Crompton (1997), we assume that academic writers need to make a clear distinction between propositions already shared by the discourse community, which have the status of facts, and propositions to be evaluated by the discourse community, which only have the status of claims. Evaluative or tentative language is one of the signs by which claims may be distinguished from facts; as Myers (1989, p. 13) argues, "a sentence that looks like a claim but has no hedging is probably not a statement of new knowledge".

Praising Meyer's work for pointing out the necessity to accentuate social norms of academic discourse communities, Hyland (1996) outlines multi-functional character of hedges in gaining acceptance for claims among a powerful group of academic peers. In his key article "Writing without conviction? Hedging in science research articles" (1996) Hyland estimates that hedges can only be analyzed in the combination of three contexts: *institutional, professional and linguistic* (ibid., p. 434). This statement introduces a socio-cultural dimension to the phenomenon under question, referring us to metadiscourse model of academic text.

Socio-cultural focus was further expressed in re-estimated metadiscourse model suggested by Hyland in 2004 (see Table 2). Interestingly, that this time it deals mostly with the two dimensions of interaction: *the interactive and the interactional one*, using the label "interactive" to replace "the textual" and

“interactional” to replace “interpersonal” (Hyland & Tse, 2004). The first dimension is related to the way the author presents material to the audience (i.e. the knowledge of the reader, the genre etc). The second dimension includes such elements of metadiscourse as hedges, boosters, attitude markers, self-mentions and engagement markers. Interactive metadiscourse includes frame markers (“first,” “in conclusion”), transitions (“therefore,” “moreover”), endophoric markers (“as discussed below”), evidential (“according to”), and code glosses (“that is to say”). Interactional metadiscourse includes boosters (“certainly,” “without doubt”), hedges (“possibly,” “might”), attitude markers (“correctly,” “arguably”), self-mentions (I, me, my, we, us, our), and engagement markers (“consider,” “note”).

Table 2: A model of metadiscourse in academic texts (adapted from Hyland and Tse, 2004)

<i>Interactive resources of academic text</i>		<i>Interactional resources</i>	
<i>Type</i>	<i>Function</i>	<i>Type</i>	<i>Function</i>
Transitions	express semantic relation between main clauses	Hedges	withhold writer's full commitment to proposition
Frame markers	refer to discourse acts, sequences, or text stages	Boosters	emphasize force or writer's certainty in proposition
Endophoric markers	refer to information in other parts of the text	Attitude markers	express writer's attitude to proposition
Evidentials	refer to source of information from other texts	Engagement markers	explicitly refer to or build relationship with reader
Code glosses	help readers grasp meanings of ideational material	Self-mentions	explicit reference to author(s)

In attempt to disclose rhetorical differences in disciplinary communities, Hyland examined 240 doctoral and master's dissertations by Hong Kong students. The most frequent category in the corpus constituted hedges (as it comprised 41% of all interactional uses (Hyland, 2004). Moreover, Hyland observed that hedges were particularly preferred by the students from “soft” sciences such as Business Studies, Public Administration, and Applied Linguistics, which comprised over 60 % of the cases (Hyland, 2004). He commented that “hard” sciences rely more on qualitative analysis or statistical probabilities in constructing knowledge, and thus, claims are made through reasonable tentativeness and careful exposition (Hyland, 2004).

Contrasting disciplinary use of metadiscourse markers has been displayed in research articles by Vazquez and Giner (2009), who analyzed the use of boosters

in RAs from different disciplines (Marketing, Biology and Mechanical Engineering). The researchers came to the conclusion that "softer sciences seem to present a stronger need for enhancing the propositional content in the containing statements, harder sciences rely on exactness of the data used in their research as sufficiently evidential to show the truth of their statements" (Vazquez & Giner, 2009, p. 235). A research article on Marketing was referred to "soft" sciences, an article on Mechanical Engineering to "hard sciences" and an article on Biology was placed somewhere in between. Results are reported to reconfirm Myers' (1992) investigation of RAs in biology, stating that the use of hedges in textbooks is reserved for matters which lack a consensus (Myers, 1992).

Nelson and Castello (2012) point out that metadiscourse shows significant differences across disciplines and across national, linguistic, and cultural traditions. General claims concern the quantity of discourse markers in "hard" and "soft" sciences: e.g. articles from the natural sciences tend to include fewer metadiscourse markers than those from social sciences and humanities (Hyland, 2008). Another argument is that more advanced practitioners of a discipline employ metadiscourse to a greater extent than the less advanced (Hyland, 2004), underpinning the differences in academic voice realization between novice and experienced writers (McCutchen, 2011, p. 54). Since development of writing skill is based on the fluency of linguistic processes, involved in text production and free access to long working memory, novice writers tend to use "knowledge telling model of writing" (Bereiter and Scardamalia, 1987) and expert writers use "knowledge transformation model of writing" (ibid.). For more insights on this issue, we will need to address psycholinguistics aspect of L1 and L2 writing (Bereiter & Scardamalia, 1987; McCutchen, 2011) that will go far beyond the limits of this paper and thus, constitutes one of the limitations to our study here. We will only take for granted the idea, that metadiscourse markers, representing academic politeness and mitigation, are more characteristic of "expert" academic writing due to higher level of linguistic and cognitive skills (Hyland, 2004).

Bearing in mind the level of writer's proficiency and his/her disciplinary sphere of professional writing, our **hypothesis** is that we can encounter considerable differences in frequency and distribution of hedges in RAs even within four sub-fields of one discipline.

Hedging and persuasion in research articles

Hyland estimates that the use of persuasion is an important characteristic of academic discourse from rhetorical point of view. The ability to argue and persuade is often cited as one of the fundamental purposes of education (Hyland, 1996, 1998; Hinkel, 2005), as it requires presentation of well supported and reasoned arguments as well as engagement with alternative points of view – challenging, critiquing, reinforcing or defending them where appropriate.

Argumentation as active knowledge building refers to the process of learners creating new cognitive artifacts as a result of common goals and synthesis of ideas (Bereiter, 2002). In academic writing argumentation of author's position and certainty is limited by the genre constraints and social demands of academic community, institutional and individual goals.

In 2001, Vassileva analyzed RAs in linguistics in English, Bulgarian, and Bulgarian English with the purpose to investigate the similarities and differences in the degree of commitment (classified by Hyland as "boosters") and detachment (named as "hedges" by Hyland) of interpersonal metadiscourse markers. The results showed considerable differences in the overall distribution of hedges and boosters throughout the three main parts of the article, namely the introduction, discussion and conclusion, which may lead to misunderstandings in cross-cultural communication. The variations were related to the different rhetorical and educational traditions to further facilitate the teaching of academic writing in English to Bulgarians. Genre of a research paper does not only extend understanding of some phenomenon or theory but helps to establish author's reputation and gain recognition of the academic community (Hyland, 1996, p. 4). This recognition is bound to writer-reader consensus on propositional meaning of non-factive statements. According to Hyland (1996), only readers can guarantee the ratification of the claims in how writers construct them (Hyland, 1996, p. 5). Since the aim of this paper is to analyze the use of metadiscourse markers represented in RAs, Hyland's model provides us with effective working instrument for realization of this objective and deserves a closer consideration.

Hyland's classification of hedges

Hyland defines persuasion in academic discourse as one of the important rhetoric techniques, where objective knowledge is supported by empirical arguments. Empirically verifiable knowledge is generally based on accuracy of calculations, representing an analytical model of knowledge formation. But, as any scientific theories are being constantly reassessed and estimated under the influence of individual and social factors, they are not perceived as objective facts anymore. Academic texts heavily rely on writer-reader communication and become acts of interactive communication, involving writing techniques of persuasion, argumentation and detachment etc. Hyland's model (Hyland, 1996:9) suggests the following generalizations in determining core cases of hedges, based on four basic characteristics: specification, verification, agentivity and cooperation with the reader (see Table 3).

Table 3: Hyland's taxonomy of hedges and their realization devices (Hyland, 1996)

Content-oriented hedges	Accuracy-oriented (hedges propositional content)	Sub-type	Devices
		Attribute type (hedges extent of accuracy)	precision adverbs: content disjuncts style disjuncts downtoners
		Reliability type (hedges certainty)	epistemic lexical verbs epistemic modal adjectives epistemic modal nouns content disjunct adverbs limited Knowledge
	Writer-oriented (hedges commitment)	-	epistemic lexical verbs: judgemental, evidential Impersonal expressions: passive voice abstract rhetors "empty" subjects Thematic epistemic devices Attribution to literature Impersonal reference to method, model, experimental conditions
Reader-oriented hedges (hedges assertiveness)			Epistemic lexical verbs: judgemental, deductive Personal attribution Personal reference to methods, model Offer alternatives: conditionals indefinite articles Involve reader direct questions reference to testability assumption of shared goal hypothetical, e.g. would

Content-oriented hedges consist of attribute hedges, reliability hedges and writer-oriented hedges.

- 1) Attribute hedge (specifies the extent to which a term accurately describes the reported phenomenon);
- 2) Reliability hedge (specifies writer's assessment of the certainty of the truth of a proposition);
- 3) Writer-oriented hedge (conceals the writer's viewpoint and avoids personal responsibility);

Reader-oriented hedge, which invites reader-involvement, accepts writer's personal responsibility for the validity of the content, was defined by Hyland as a separate type of hedges.

Following opposition of *adequacy* and *acceptability* of utterances, Hyland (1996) divided hedges into content-oriented (eg. 1) and reader-oriented (eg. 2) types, examples of which we can see below:

- (1) For many years it has been assumed that elements contributing to manipulative or persuasive purposes of an author were not appropriate in academic writing. It was assumed that in this type of discourse only aseptic truths should be allowed.
- (2) Among the rhetorical precepts that found application in the study and teaching of identity in writing was the Aristotle's notion of ethos, which "*is concerned with the character of the speaker*"—defined in terms of wisdom (phronesis), moral character (arete), and goodwill (eunoia)—"as portrayed in the speech itself".

According to this division, hedges anticipate a need to justify claims, because the author is dependent on their ratification by the reader (Hyland, 1996:6). Degree of delicacy in expressing proposition is represented by the following two types of hedges: *accuracy-oriented* (eg 3) and *writer-oriented* (eg 4).

- (3) In the early years of written discourse analysis and language teaching, identity did not receive much attention partly because the application of written discourse analysis focused primarily on academic writing instruction in a limited range of classroom genres, and the pragmatic goal of helping writers conform to the native-speaker norm was widely accepted.
- (4) However, no writers, not even scientists in these post-modern and postpositivist days can any longer claim neutrality and objectivity. They cannot claim to get reality right.

We will now analyze the core cases of hedges used in RAs on Applied Linguistics, beginning with *the content-oriented type*.

Content-oriented hedges

According to Hyland (1996), content-oriented hedges mitigate the relationship between propositional content and representation of reality of what the world is and what it might be. Using this type of hedges the author protects himself from a poor judgment or focus on accuracy. Depending on these functions hedges fall into two sub-types: *accuracy-oriented* and *writer-oriented*.

Accuracy-oriented hedges

There is a strong belief that academic discourse tries to demonstrate its absolute truth, based on empirical research. As Hyland (1998:73) points out

„academic writing provides an objective description of what the natural and human world is actually like and this, in its turn, serves to distinguish it from the socially contingent“. Stating uncertain scientific claims with caution (Rounds, 1982; Skelton, 1988) the author reduces risk of negation on objective grounds.

The main function of accuracy-oriented hedges is to persuade the reader of objectivity and plausibility of information given. Depending on motivation of use and realization, they can be of *attribute* and *reliability* types.

Prominent generic fact about RAs lies in a strong link between existing knowledge and results originated in academic discourses. As scientific theories are constantly being reassessed and reevaluated, the authors of the academic texts should take the premises for the readers to accept their claims as true. For this purpose, the authors use attribute hedges, which allow certain deviations from idealized state of fact.

Attribute hedges cluster around pragmatic core with “the degree of precision adverbs” (Ernst, 1984 cited in Hyland, 1996), similar to “rounders” (Prince et al., 1982) or stance adverbs (clearly, probably, apparently) present the attitude or assessment of the speaker/writer with respect to the proposition (Biber, 2006).

Interestingly, that stance is defined as “a textual voice”, conveying the attitudinal manner of the writer (Hyland, 2001, p. 176). Similarly, Conrad and Biber (2000) identifies stance as attitudinal stance which reflects the writer’s attitude towards an issue, event, or person. Functioning like “downtoners” (Quirk et al., 1972, cited in Hyland, 1996, p. 11), *attribute hedges* weaken the force of an attribute varying in their strength (see eg. 5, 6, 7).

- (5) Data exposed that there are more instances of self-mentioning pronouns in the corpora of English with 0.64% in comparison with Psychology (0.47%).
- (6) Let us have a brief look at sciences. In general terms, hard sciences have the label of reliable because they seem to be involved with objective, empirically verifiable knowledge.
- (7) These conventions might ensure academic writers that their work will actually be recognized by readers and accepted by their colleagues in that discourse community.

Writer-oriented hedges

Writer-oriented hedges, as Hyland represents them, are writer-focused and „aim to shield the writer from the consequences of opposition by limiting personal commitment“ (Hyland 1996:14). The considerable difference between accuracy-oriented hedges, which are proposition-focused, and writer-oriented is the fact of diminishing the claims an author’s presence in the text by maximum detachment from the author’s proposition. The distinctive feature of the writer-oriented hedge is absence of writer agency, which can be reached with the help of passive verbal constructions (e.g. it might be expected - 8), or the construction with abstract

meaning (e.g. data indicate - 9), judgemental epistemic verbs (e.g. assume, predict, propose - 10), evidential verbs (e.g. appear, seem - 11) etc.

- (8) As Koutsantoni (2004:172) affirms, the use of boosters “can be motivated by epistemological reasons and be based on the results and findings themselves, and combined with the social goals in scientific communities, such as gaining agreement and consensus by appealing to common knowledge and shared understandings.
- (9) Ideational aspects made reference to the writer’s generation and organization of the ideas by means of techniques such as brainstorming or outlining and /or the use of sources to write well-documented texts by gathering ideas (Article #7).
- (10) From interviews, Gina stated that her major obstacle with writing was engagement and motivation.
- (11) Findings revealed that experienced authors used personal pronouns significantly in the introduction of research articles.

One of the effective ways of diminishing writer's responsibility in academic text is a shift of accent from the author's claim to the procedures, the methods and the models under which the research results were procured.

The motivation for writer-oriented hedges is the preliminary character of the scientific research per se, which needs to be hedged against later misinterpretation, showing premature character of the results of novice writers.

Summing up, the use of content-oriented hedges, we presume that they enable the writer of the academic text both negotiate the precision of his claims and, at the same time, convey a distant attitude to them, showing greater or smaller degree of reliability. Fuzziness of hedges, as Hyland admits, sometimes makes the process of classification complicated enough to relate one hedge to a certain category exclusively. This might be explained by their multipragmatic functions, suggesting that most of the core hedging devices will be at the periphery between accuracy- and writer-oriented hedges.

Reader-oriented hedges

The role of the reader in accepting or rejecting the claims of the author (the author's voice) was described by Matsuda (2001) as “the amalgamative effect of the use of discursive and non-discursive features that language users [appropriate], deliberately or otherwise, from socially available yet ever-changing repertoires” (Matsuda, 2001, p. 40). Hyland classifies these discursive and non-discursive features as the writer's *persona* (1996, p. 18), meaning by it the author's degree of subjectivity, and information about the writer's professional attitudes to the discipline. According to Hyland, every academic writer is negotiating with the reader reliability of his claims in a form of a dialogue. And hedges, in their turn,

serve as a certain inviting strategy, addressing the reader as a capable interlocutor ready to view his claims with open critical mind.

The core examples of reader-oriented hedges show a certain force of diminishing categorical statement with the help of different devices (sometimes a combination of devices) like in examples below:

- (12) Although ethos and voice have evolved into similar concepts over the years, and although it is likely that the evolution of voice was influenced by ethos and other conceptions of writer identities in some ways, it would not be accurate to say that voice originated from ethos (Matsuda, 2015, p. 142).
- (13) This study might be helpful for academic writing of EFL learners.
- (14) In spite of these findings, it is also possible that our learners might have upgraded their linguistic concerns about L2 accuracy when writing, although our data collection instruments may not have been sufficiently adequate to capture this.

The repetition of adverbs although (eg. 12), or a combination of adverb+adjective sufficiently+adequate (eg. 14) function as a downtoners (Prince, 1972), diminishing significance of the research results obtained, and engaging the readers into active participation in ratification of claims by using adverbs of probability and hypothetic would (eg. 12) or modal verb might (eg. 13).

Additional softening of criticism in the academic writing is achieved with the use of first-person pronouns (I, we) and their possessive counterparts (my, our). Multifunctional character of the first-person pronouns in academic texts has been stated previously by Clark and Ivanic (1997), Hyland (2002), Tardy (2012). But apart from being an important structural component of the discourse and presenting personal experience in formulating statement (Clark & Ivanic, 1997), self-mentioning pronouns can considerably influence the angle of text perception for the reader. In this case, the first-person pronouns and expressions of personal belief weaken claims because they are inconsistent with the supposed universality of scientific knowledge (Myers, 1989, p. 14). Used as hedges, as Hyland states, personal pronouns signal a personal opinion, not the universal truth, and allow the reader to choose the more persuasive explanation.

Results and discussion

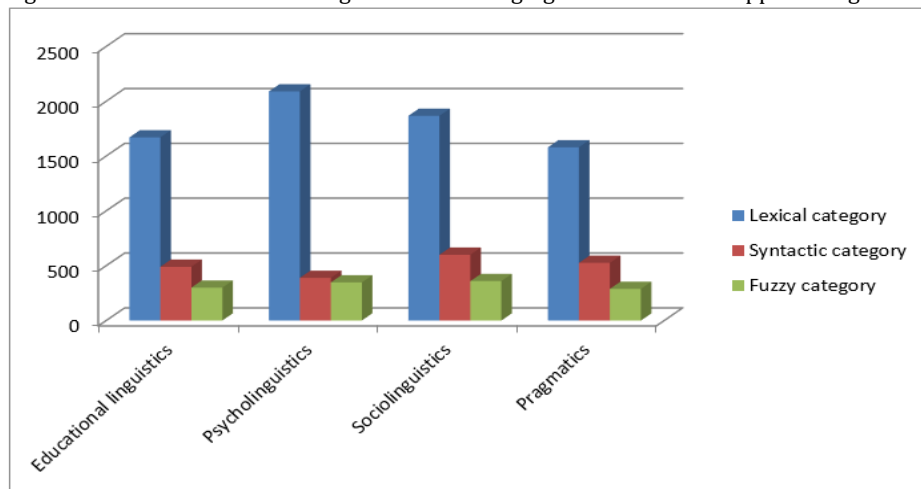
Corpus for analysis consisted of 20 scientific research articles on topics, related to applied linguistics, published from 2010 to 2017 in scientific journals with an open access policy. Considering that Applied Linguistics is interdisciplinary subject related to education, psychology, communication research, anthropology, and sociology, in order to avoid any possible variation across sub-disciplines, I have compiled the corpus from research papers in the specific subfields of Applied Linguistics: such as Educational linguistics (5 research

articles), Psycholinguistics (5 research articles), Sociolinguistics (5 research articles) and Pragmatics (5 articles), structured according to IMRAD pattern (Introduction –Methods-Results –and – Discussion structure).

After the selection, RAs were analyzed in terms of the frequency of hedges in the articles. Thus, the occurrences of hedges in each article were identified and classified. Tables, Figures, footnotes and captions were not included to form the corpus of almost 70,089 words.

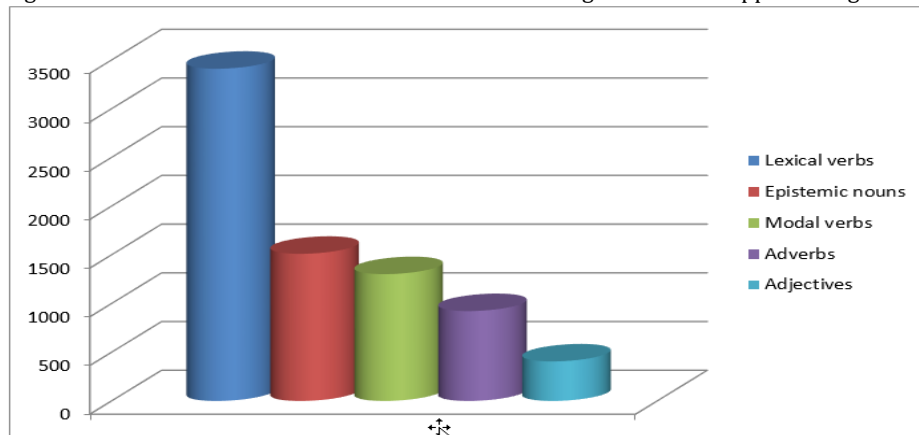
The first phase of analysis included distribution of the overall hedging devices into the following two categories (lexico-grammatical) and syntactic (devices): lexical verbs, epistemic nouns, modal verbs, adverbs, adjectives and “if”-clauses, rhetorical questions etc. Figure 1 presents raw numbers of lexical, grammatical and syntactic devices in RAs across specific sub-fields of Educational Linguistics, Psycholinguistics, Sociolinguistics and Pragmatics. Those devices, which we couldn't refer, either to lexical or grammatical category, were included into “Fuzzy category” or represented in the Figure 2 below.

Figure 1: Raw numbers of lexico-grammatical hedging devices in RA on Applied Linguistics:



Since one and the same lexical device can form different combinations of hedged information, the data obtained from the corpus were manually distributed according to the following parameters (lexical verbs, epistemic nouns, modal verbs, adjectives and adverbs) and calculated in every research article to form the frequency and percentages of their use (see Figure 2).

Figure 2: General distribution of lexical devices of hedges in RA on Applied Linguistics:



The analysis revealed that the hedging devices in research articles on Applied linguistics were represented more by lexical verbs, which constituted 3411 cases of use. This signifies the fact, that the writers of research articles are trying to arrange their persuasive techniques appealing to the reader's attention with the help of epistemic lexical verbs.

Table 4: Distribution of hedges in research articles on applied linguistics by subdisciplines per 1,000 words

Hedge-type	Educational Linguistics	Psycholinguistics	Sociolinguistics	Pragmatics
1. Content-oriented	55.1	48.8	49.5	44.3
Accuracy-oriented	25.5	19.5	22.3	20.4
Attribute type	16.4	15.5	12.6	10.3
Reliability type	2.2	3.8	4.6	9.7
Writer-oriented	11.1	10.6	10.0	3.9
Reader-oriented	60,5	79.2	68,4	59.8
Total	115.6	128	117.9	104.1

Table 3 shows prevailing number of reader-oriented hedges in Research Articles. It was an expected outcome, as this type of hedges recognises the need for reader's acceptance in accrediting knowledge and respond to the possibility of opposition to claims on interpersonal grounds. Here writers consider both the reader's role in confirming knowledge and the need to conform to community expectations regarding deference to colleagues' views. Multiple examples are therefore distinguished by features addressed to the needs of an audience, which anticipates involvement in negotiating claims.

The findings for distribution of hedging devices and types of hedges in this study represented less evident contrasts between subdisciplines of one discipline than between „hard“ and „soft“ sciences, but still they show a certain gradation among the categories of hedges (e.g. the lowest level of reliability hedges in Pragmatics and the highest in Educational Linguistics). Even more discursive nature of these soft disciplines necessitated emphasising their greater reliance on multi-modality and arguments which require frequent reference to tables, figures, photographs, examples, and so on. This tendency can be significantly observed in comparing research articles dated by 2010 and 2017. We didn't set it as a study objective to analyse the use of Tables, Graphs, Figures and Footnotes in this paper. So we will relate this observation to limitations of this paper, which deserves attention in further research of multimodality.

Conclusion

Conventions of academic discourse call the writers of Research Articles for effective use of interactional techniques, on the one side and building their academic identity (voice), on the other. Balancing between these two extremes, academic writers are mastering a scientific art of politeness (Myers, 1987) in formulating their claims. Hedges help the authors to mitigate the force of their claims and make them less categorical in the eyes of colleagues. The study results confirmed that content-oriented hedges enable the writers of the research articles both negotiate the precision of their claims and, at the same time, convey a distant attitude to them, showing greater or smaller degree of reliability. Although, Hyland's taxonomy of hedges and their devices seemed efficient in certain contexts, it lacked a uniform attitude to hedges distinction in other situations. The reasons for this we see in the multifunctional character of hedges in pragmatic aspect and innate vagueness of hedges in their semantic basis. Fuzziness of hedges, as Hyland himself admits, sometimes makes the process of classification complicated enough to relate one hedge to a certain category exclusively. The current study attempted to reveal the frequencies and types of hedges within one „soft“ discipline Applied Linguistics, including RAs from four related sub-disciplines Educational linguistics, Psycholinguistics, Sociolinguistics and Pragmatics. In spite of the fact, that the findings for distribution of hedging devices and types of hedges in this study represented far less evident contrasts within four sub-disciplines than between „hard“ and „soft“ sciences, but they still show a certain degree of disproportion, based on author's degree of subjectivity, his or her degree of commitment to the topic of research and expertise in academic writing („novice“ or „expert“ writers). In this study we purposefully tried to avoid contrastive rhetoric framework, accentuating cross-cultural and national aspects of writing. It may be considered as one of the limitations of this paper. Implications for educational linguistics will concern study of hedging language in EAP courses

for EFL learners according to the norms and conventions of particular academic disciplines. Further research implications might be much more fruitful within interdisciplinary approach, combined with discourse analysis of broader fields of knowledge and cognitive linguistics.

Acknowledgment

I wish to thank Austrian Government Scholarship Foundation for opportunity to use Library of Vienna University resources in the framework of my scholarship stay there.

References

- Bereiter, C., & Scardamalia, M. (1987). *The psychology of written composition*. NJ: Erlbaum.
- Biber, D. (1988). *Variation across Speech and Writing*. Cambridge: Cambridge University Press. <http://dx.doi.org/10.1017/CBO9780511621024>.
- Biber, D. (2006). *University Language: A Corpus-Based Study of Spoken and Written Registers*. Amsterdam/Philadelphia: John Benjamins. <http://dx.doi.org/10.1075/scl.23>.
- Blagojevic, S. (2004). Metadiscourse in academic prose: A contrastive study of academic articles written in English by English and Norwegian native speakers. *Kalbu Studijos (Studies about Languages)*, 5, from <http://www.kalbos.lt/txt/5/08/htm>.
- Çakır, H. (2016). Native and Non-Native Writers' Use of Stance Adverbs in English Research Article Abstracts, *Open Journal of Modern Linguistics*, 2016, 6, 85-96 <http://dx.doi.org/10.4236/ojml.2016.62008>.
- Clark, R., & Ivanic, R. (1997). *The politics of writing*. London, UK: Routledge.
- Clyne, M. (1991). The sociolinguistic dimension: The dilemma of the German-speaking scholar. In H. Schroder (Eds), *Subject-oriented texts: Languages for special purposes and text theory* (pp. 49-68). Berlin & New York: Walter de Gruyter.
- Conrad, S., & Biber, D. (2000). Adverbial Marking of Stance in Speech and Writing. In S. Hunston, & G. Thompson (Eds.), *Evaluation in Text: Authorial Stance and the Construction of Discourse* (pp. 56-73). Oxford: Oxford University Press.
- Crompton, P. (1997). Hedging in academic writing: some theoretical problems. *English for Specific Purposes*, 16(4), 271-287. Retrieved from: https://www.academia.edu/478555/Hedging_in_academic_writing_Some_theoretical_problems.
- Ernst, T. B. (1984). *Towards an integrated theory of adverb position in English*. Indiana Linguistics Club.
- Grabe, W. & Kaplan, R. B. (1997) *Theory and practice of writing: an applied linguistic perspective*. Harlow: Pearson Education.

- Hinkel, E. (1997). Indirectness in L1 and L2 academic writing. *Journal of Pragmatics*, 27, 361-386.
- Hinkel, E. (2005). Hedging, inflating, and persuading in L2 academic writing. *Applied Language Learning*, 15(1), 29-53.
- Holmes, J. (1984). Modifying Illocutionary Force. *Journal of Pragmatics*, 8, 345-365. [http://dx.doi.org/10.1016/0378-2166\(84\)90028-6](http://dx.doi.org/10.1016/0378-2166(84)90028-6).
- Hyland, K. (1996). Writing without Conviction: Hedging in Science Research Articles. *Applied Linguistics*, 17, 433-454. <http://dx.doi.org/10.1093/applin/17.4.433>.
- Hyland, K. (1998). Hedging in Scientific Research Articles. Amsterdam: John Benjamins. <http://dx.doi.org/10.1075/pbns.54>.
- Hyland, K. (1999). Disciplinary Discourses: Writer Stance in Research Articles. In H. Candlin, & K. Hyland (Eds.), *Writing: Texts, Processes and Practices* (pp. 99-121). London: Longman.
- Hyland, K. (2000). *Disciplinary Discourses. Social Interaction in Academic Writing*. London: Longman.
- Hyland, K. (2001). Bringing in the Reader: Addressee Features in Academic Writing. *Written Communication*, 18, 549-574. <http://dx.doi.org/10.1177/0741088301018004005>.
- Hyland, K. (2002). Authority and Invisibility: Authorial Identity in Academic Writing. *Journal of Pragmatics*, 34, 1091-1112. [http://dx.doi.org/10.1016/S0378-2166\(02\)00035-8](http://dx.doi.org/10.1016/S0378-2166(02)00035-8).
- Hyland, K. (2004). Perspectives on Genre. In K. Hyland (Ed.), *Genre and Second Language Writing* (pp. 24-50). Ann Arbor, MI: The University of Michigan Press.
- Hyland, K. (2005). Stance and Engagement: A Model of Interaction in Academic Discourse. *Discourse Studies*, 7, 173-192. <http://dx.doi.org/10.1177/1461445605050365>.
- Hyland, K. (2017) Metadiscourse: What is it and where is it going? *Journal of Pragmatics*, 113, 16-29 <https://doi.org/10.1016/j.pragma.2017.03.007>.
- Hyland, K., & Tse, P. (2004). Metadiscourse in Academic Writing: A Reappraisal. *Applied Linguistics*, 25, 156-177. <http://dx.doi.org/10.1093/applin/25.2.156>.
- Kreutz, H., & Harres, A. (1997). *Some observations on the distribution and function of hedging in German and English academic writing*. In Duszuk, A. (Ed.), *Culture and styles in academic discourse*. Mouton de Gruyter: Berlin, pp.181-202.
- Lakoff, G. (1972). Hedges: A study in meaning criteria and the logic of fuzzy concepts. *Chicago Linguistic Society Papers*, 8, 183-228.
- Lewin, B. (1998) Hedging: Form and Function in Scientific Research Texts. *Genre Studies in English for Academic Purposes*. Vol. 9. Filologia, pp. 89-108.
- Markkanen, R., & Schroder, H. (1997). *Hedging: a challenge for pragmatics and discourse analysis*. In Markkanen, R., Schroder, H. (Eds.) *Hedging and discourse:*

- approaches to the analysis of a pragmatic phenomenon in academic texts, pp. 3-20. Berlin: Walter de Gruyter.
- Matsuda, P.K. (2015) Identity in written discourse. *Annual Review of Applied Linguistics*, 35, 140-159. <https://doi.org/10.1017/S0267190514000178>.
- Mauranen, A. (1993). Contrastive ESP rhetoric: Metatext in Finnish-English economics texts. *English for Specific Purposes*, 12, 3-22. [https://doi.org/10.1016/0889-4906\(93\)90024-I](https://doi.org/10.1016/0889-4906(93)90024-I).
- McCutchen, D. (2011). From novice to expert: implications of language skills and writing-relevant knowledge for memory during the development of writing skill. *Journal of writing research*, 3(1), 51-68. <http://dx.doi.org/10.17239/jowr-2011.03.01.3>.
- Meyer, P. (1997). Hedging strategies in written academic discourse: Strengthening the argument by weakening the claim. In Markkanen, R., Schroder, H. (Eds.), *Hedging and Discourse: Approaches to the Analysis of a Pragmatic Phenomenon in Academic Texts*, pp.21-41. Berlin, New York: Walter de Gruyter.
- Myers, G. (1989). The pragmatics of politeness in scientific articles. *Applied Linguistics*, 10, pp.1-35.
- Nelson, N. & Castello, M. (2012) *Academic writing and authorial voice*. doi: 10.1108/S1572-6304(2012)0000024007.
- Prince, E., Frader, J., & Bosk, C. (1982). On hedging in physician-physician discourse. In R. D. Pietro (Eds.), *Linguistics and the professions* Hillsdale, NJ: Ablex.
- Rounds, P. (1982). *Hedging in written academic discourse: Precision and flexibility*. Ann Arbor: The University of Michigan. Mimeo.
- Salager-Meyer, F. (1994). Hedges and textual communicative function in medical English written discourse. *English for Specific Purposes*, 13(2), 149-170.
- Salager-Meyer, F. (1997). I think that perhaps you should: A study of hedges in written scientific discourse. In T. Miller (ed.), *Functional approaches to written texts: Classroom applications* (pp. 127-143). Washington DC: United States Information Agency.
- Salager-Meyer, F. (1998). Language is not a physical object. *English for Specific Purposes*, 17, 295-303.
- Skelton, J. (1988). The care and maintenance of hedges. *ELT Journal*. 42(1), 37-43. doi: 10.1093/elt/42.1.37.
- Vassileva, I. (1997). Hedging in English and Bulgarian academic writing, culture, and style in academic discourse. Mouton de Gruyter: Berlin.
- Vassileva, I. (2001). Commitment and detachment in English and Bulgarian academic writing *English for Specific Purposes* 20(1), 83-102. [https://doi.org/10.1016/S0889-4906\(99\)00029-0](https://doi.org/10.1016/S0889-4906(99)00029-0).

- Vazquez, I. & Giner, D. (2009). Writing with conviction: the use of boosters in modeling persuasion in academic discourses. *Revista Alicantina de Estudios Ingleses* 22 (2009), 219-237. <https://doi.org/10.14198/raei.2009.22.14>.
- Ventola, E. (1997). Modalization: Probability – an Exploration into its Role in Academic Writing. In Duszak, A. (Ed.), *Culture and Styles in Academic Discourse*. Mouton de Gruyter: Berlin, pp.157-180.

Contact

Inna Livytska, Ph.D.

Associate Professor at Department of English Language and Methodology
Volodymyr Vynnychenko Central Ukrainian State Pedagogical University
25006 Kropyvnytskyi, 1 Shevchenko street
Ukraine
inna.livytska@gmail.com

PhD graduates at Czech Universities: the Account of their Study, Postdoc Options and Job Ambitions

Adriana Wiegerová

Faculty of Humanities, Thomas Bata University in Zlín, Czech Republic
wiegerova@utb.cz

Abstract

The aim of the paper is to describe the PhD study and after graduation situation of graduates of Czech universities who completed their programme between 2010 - 2017. The first phase of the investigation was a quantitative study of a representative sample of Czech PhD graduates that aimed at revealing details of their study and after-graduation opportunities and careers. The second phase of the investigation was a qualitative study of a small sample aimed at understanding the reasons of young people to pursue a PhD programme at a university, to reveal academic, social and personal factors that influenced their decision to complete the PhD study and start an employment at a university.

Key words: academic career, PhD study graduate, postdoc

Introduction

Educational research has accumulated rich data about the studies and lives of doctoral students (Davis, 2013; Gardner, 2007; McAlpine, Jazvac-Martek & Hopwood, 2009; Turner & McAlpine, 2011; Jaraim & Kahl, D., 2012; Neusar, Charvát et al., 2012; Vekkaila, Pyhältö & Lonka, 2013, Kosová, 2013). A wealth of information has also been collected about postdoctoral years (Melin, 2005; Mareš, 2013, Åkerlind, 2008). However, data concerning the professional paths of university teachers in the Czech Republic after completion of a doctorate are scarce. Some findings were published by Šed'ová et al. (2016), but they primarily concentrated on the quality of teaching and self-concept of young teachers at one Czech university. This investigation serves to extend the knowledge about doctoral graduates providing both a picture of a representative sample of graduates and a detailed portrayal of a small sample of them.

Research aims

The paper is aimed at describing the PhD study and after graduation situation of graduates of Czech universities who completed their programme between 2010 -2017.

The *first phase* of the investigation was a quantitative study of a representative sample of Czech PhD graduates that aimed at revealing details of their study and after-graduation opportunities and careers.

The second *phase* of the investigation was a qualitative study of a small sample aimed at understanding the reasons of young people to pursue a PhD programme at a university, to reveal academic, social and personal factors that influenced their decision to complete the PhD study and start an employment at a university.

Overall, the two phases of the investigation describe the developmental phases in academic and occupational careers of young university graduates, including the external and internal factors that determined their professional growth in the Czech Republic.

Research desing

In the *first phase* of the investigation the aim was to obtain a broad picture of PhD graduates in every discipline offered at Czech universities. We wanted to learn about the duration of the study, option for study abroad, and postgraduation careers. The respondents are a representative sample of Czech university PhD graduates who completed their PhD programme at Czech universities between 2010 - 2017 and then entered the labour market ($N = 302$). The demographic breakdown of the sample is displayed in Table 1.

Table 1: Three variables of the representative sample of PhD graduates sample ($N = 304$)

Age	M=33.6; SD 2.9	Range 28 – 50
Nationality	Czech 85.1 %	Slovak 14.6 %
Branch of study	Sciences 57.3 %	Humanities 42.7 %

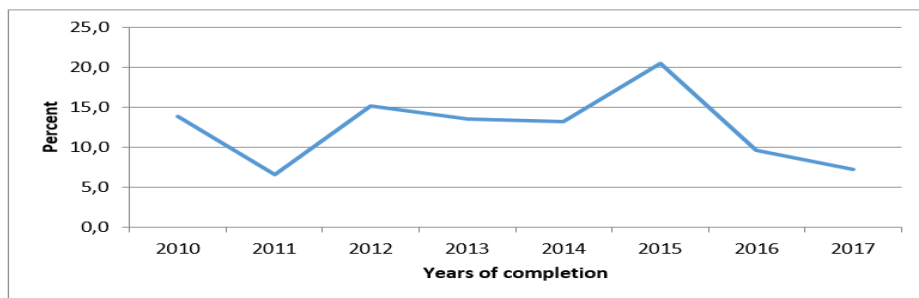


Fig. 1: The number of PhD students graduating between 2010 and 2017 ($N = 304$)

The respondents' branch of PhD study was divided into two broad categories. *Humanities* include arts, linguistics, sociology, history, psychology, education, Bible studies, international relations, and economics. *Sciences* include chemistry, physics, technology, metallurgy, building, transportation, mathematics, architecture, and computer science.

In the *second phase* of the investigation (2013-2016) qualitative data were gathered about PhD graduates (see Wiegerová, 2016) explaining the prolongation of their PhD programme and description of their jobs at a university. The sample consisted of ten participants who were employed at universities in the Czech Republic at the time of the study. They were seven females and three males, belonging to the same generation of university teachers. They shared these characteristics:

- a) Age (between 27 and 40)
- b) PhDs in pedagogy
- c) Employment contract at a university in the Czech Republic
- d) Commitment to sharing their academic and vocational experience with the researcher.
- e) Provision of oral consent with participation in the study.

At the time of the investigation, the study participants worked at the university a maximum of five years. They were contracted for the position of a university teacher. Thus, this sample consists of university teachers who have already been integrated into the professional community and have been published. In the recruitment process, I invited fifteen university teachers to participate in the study. However, only ten consented. These constitute the sample. The reasons for refusal was lack of time or some unclearly-stated concerns about privacy. The following sections contain individual characteristics of the study participants, starting with the three men.

Methods

Questionnaire

In the first phase of this investigation a questionnaire was used that consisted of closed and open questions. They concerned the age and nationality of the graduates, the year of completion of the PhD programme, duration of the study, PhD study branch, interest in a postdoc position, participation in a mobility programme abroad exceeding two months, and the current employment. The respondents were addressed individually by trained survey specialists, questions were read to them and their answers were recorded and quantitatively analysed.

In-depth interview

The research method used in the second phase of the investigation was in-depth interview administered by the authoress. In the preparatory phase, the content frame of the interview was constituted. The frame consisted of topics as follows:

- motives to study for a doctorate
- views of university teacher responsibilities
- identification with the position of a university teacher
- identification with the position of a researcher
- views of the next phases of the professional career.

At the beginning of the field data collection, the participants provided informed consent. The purpose of the study and the circumstances were explained to them, including how their anonymity would be protected by the researcher. The place and the time of interview was negotiated.

The interview consisted of a set of questions generated from the thematic domains. Many questions emerged during the interview. The first few interviews convinced me of the relevance of the thematic domains. Gradually, the questions became more aim-directed and clearer. My strategy was to let the interviewee talk continuously, as interruption-free as possible.

Only two identical questions were posed to all participants, the first and the last. The intention of the first question was to draw the participant into the interview. The question was, "How do you recall your doctoral studies?" It elicited recollections and thus served as an efficient stimulator. The last question, "What will you recall tonight about our meeting?", aimed at participant self-reflection.

A specific feature of the interview was that the participants themselves have had experience with empirical research, so they critically followed my way of managing the interview. They observed my verbal and nonverbal communications and probably evaluated them. Being aware of this "participatory monitoring" brought a certain burden to the conduct of my interview.

Another specific feature was that the participants themselves posed questions to me. This also may be attributed to the research experience of the participants. For instance, they frequently asked a question like, "How was this in your case?". This can be interpreted as testing the researcher and as an effort to gain a stronger position in the conversation. Sometimes, the participants posed questions because they were unable to answer my questions. Interestingly, such questions were only asked by women.

The interviews generally took place at the participants' "home universities" and in their offices, to increase their comfort. There were two exceptions: two male participants agreed to be interviewed outside of their workplaces, but still at a

university, a relatively familiar environment. The duration of the interviews was dictated by time constraints of the participants, albeit with a minimum requirement of one hour.

Each interview was recorded on two voice recorders, which minimised losses in case of the failure of one recorder. Transcripts were made from both recordings by two assistants, and the two versions of the transcripts were compared for accuracy. Discrepancies were resolved in discussion. As a result, a single transcript was made from the two.

To begin with, I organized an unrecorded informal initial conversation with each participant, during which I explained the purpose of the study. The participants were encouraged to ask questions, which they did. The questions concerned, for instance, the implementation of the research findings. The participants were assured that no personal information would be misused. Privacy was protected by anonymising the transcripts.

After the formal interview, an off-record conversation usually took place in which the participants asked more questions usually related to my personal experience with a PhD programme or my work at the university. This part of the session took as long as one hour. For both the participants and myself, emotions accumulated during the interview, and were necessary to release. The post-interview, off-record conversation served this purpose.

There are several styles of conducting an interview. As far as this study is concerned, I would refer to my style as a listening colleague.

After the completion of the interview sessions, transcripts of the interviews were created. A transcript is a conversion of an oral record into written form. This conversion is a pragmatic matter. Analysis of transcripts is more comfortable than that of a sound recording. In the written text, one can easier locate necessary segments, and the written format enables the coding procedure and the inclusion of the researcher's memos.

Transcripts are prepared according to rules which constitute a system that guarantees the uniform conversion of all records into the written form. Thus, transcription constitutes a reliable tool for data analysis. There exists a variety of transcription systems used in qualitative investigations, differing by approach to data and degree of detail. The selection of the system is determined by the aims of the investigation and the researcher's theoretical perspective. For instance, in conversation analysis (Jefferson, 2004), researchers use a *narrow transcription*, which captures both the verbal content of the speech and paralinguistic features such as emphasis, pitch, length of pauses (measured in tenth of seconds), etc. Many qualitative researchers do not need such a minute transcript; rather they concentrate on the content of speech. This was also my case. The transcription rules used in my study were as follows: accurate verbatim verbal content of the participants and the researcher, including incomplete words and "repairs",

expressions of agreement (“mhm”) and hesitation (“ehm”), pauses longer than 3 sec. (“...”), laughter (“laugh”), incomprehensible segments caused by mispronunciation, external noise, etc. (“incomprehensible”). These transcription rules proved satisfactory and fully functional for the analysis.

The analysis was based on a recursive reading of transcripts, through which I gradually immersed myself into the thinking and opinions of the participants and created a global view of them, attempting to understand the interview as a compact whole (Pope et al., 2000). I made frequent interpretative memos, highlighted important segments and looked for relationships among them. Gradually, I constructed a memos system for the next phase of data analysis (Miles, Huberman & Saldaña, 2014, p. 93).

Results

Duration of the PhD study

The first question in the quantitative phase of the investigation concerned the duration of the respondents’ PhD study. Fig. 2 shows that a five year long study predominated in the sample. Nearly half of the respondents needed 10 semesters to complete it. About one-third of the sample exceeded the recommended duration of study by one year and a small portion of respondents studied as long as eight years.

The standard length of PhD study in the Czech Republic is four years. Earlier it was even shorter – three years. However, this proved to be an extremely short period, resulting in failure to complete the programme by students. Our data show that only 13.6 % of PhD students were able to complete the programme in four years.

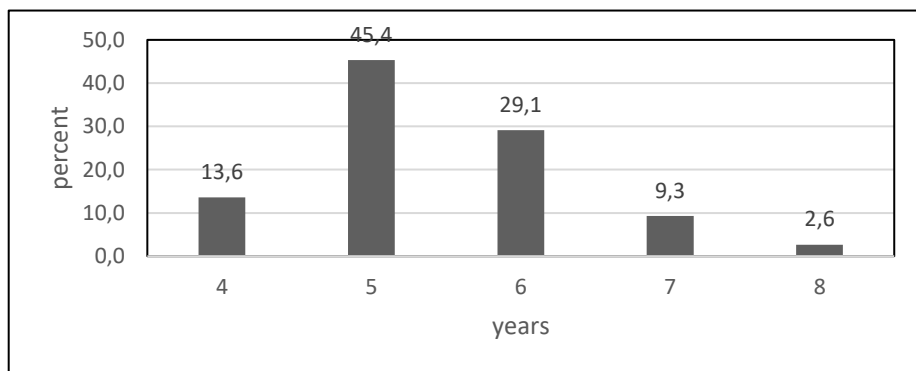


Fig. 2: Duration of the respondents’ PhD study (N = 302)

On the other hand, the majority of PhD students extended their study by one or two years. In contrast to assumptions, the four years long study was not typical for full time students; many of them studied longer.

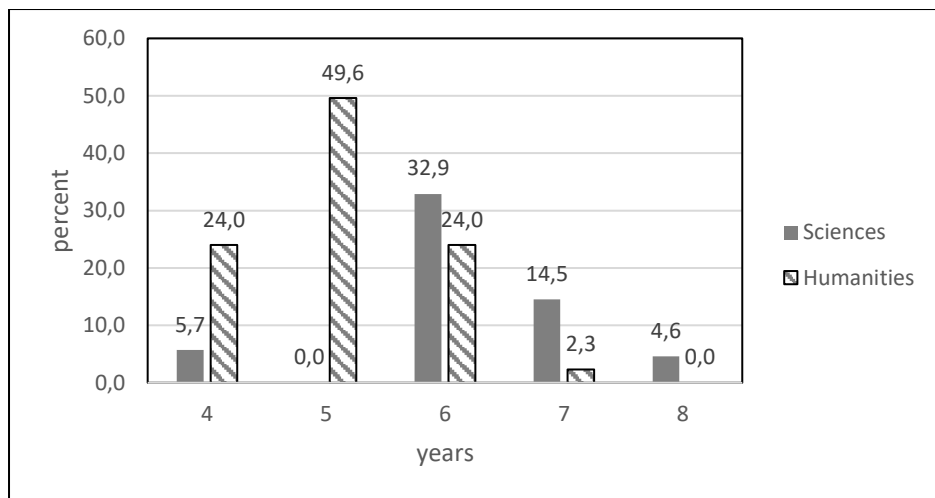


Fig. 3: Duration of the respondents' PhD study according to the study branches (N = 302)

Universities in the Czech Republic have a varied attitude towards extension of the PhD study beyond the prescribed period. Many of them permit the extension as long as seven years, others not. The prolongation is a logical step if the university wants to have graduated doctoral students. For instance, Faculty of Arts in Brno typically allows to extend the study. During the last ten years only two students completed their programme within four year, others extended their studies up to double of this figure (Pol, 2018).

A more detailed picture of the duration of the PhD study can be obtained if the respondents are grouped into the two large branches of study. Fig 3 shows that most of the students in sciences completed their PhD programme in six years, while students in humanities in five years. There were minimum students who graduated after 6 or 7 years, and none of them studied as long as eight years.

Reasons of the PhD study prolongation

The reasons of the prolonged duration of PhD studies, other than the specialisation of the PhD programme, was the main finding of the qualitative part of the investigation. The reasons, which were identified, were both academic, occupational and personal:

- High academic demands of the PhD programme.
- Weak or no knowledge of a foreign language - a prerequisite to study foreign literature.
- Study abroad (Students opt for an international study that, on one hand make them possible to acquire new competences and experiences, on the other hand, it prolongs it.)
- Family situation (motherly responsibilities of female students).
- Taking a job (it is not rare that full-time doctoral students take an employment to improve their financial matters).
- Establishing a family (this factor either prolongs the study or forces the student to transfer to part-time study).
- Workload of the students in part-time programme. They have problems to harmonize employment and study requirement
- Scientific maturation (those students who extended their study claimed that they needed time to mature for scientific work).

A fine-grained analysis in the qualitative part of the investigation identified two groups of students according to their academic routes (Table 2). Group one consists of 6 students, group two had 4 students. (All participants focused their PhD in Educational Studies.) The two groups differed in the length of the PhD study, age of its completion, motivation to pursue the study, effort to gain a stable position at a university (equals to associate professorship) or strong self-demands.

First group = academic route No. 1	Second group = academic route No. 2
Rapid pace of PhD studies; usual duration of 4 years.	Slower pace of PhD studies, usual duration of 5-7 years.
Age of completion, 25-27.	Age of completion, 30+
Naïve conceptualisation of PhD studies; strong motivation for earning an associate professorship.	Strong motivation for research projects.
Effort to ease the route to associate professorship.	Higher self-demands.

Table 2: Professional routes of the two groups of PhD graduates (Wiegerová, 2016)

Study abroad

University students are offered mobility programmes abroad, such as Erasmus+. These programmes generally aim to increase their research competence in the particular field and develop a better command of a foreign language. Though these students often witness barriers and obstacles during their

study outside the Czech Republic, in general, they evaluate this study and research experience favourably. Students in PhD programmes – in addition to those in Bc and Mgr programmes – have a priority to engage in international research, including becoming members of research teams and thus expand their knowledge and skills atop of those learned at their home university.

It was a surprising finding that as many as 65.2 % of students in the representative sample of doctoral graduates of the present investigation did not take part in international study visits. It was also a surprise to find out that PhD students in humanities significantly outperformed those in sciences in taking the opportunity of study abroad for a period of two months or longer. As many as 41.8 % of the respondents spent a period within their study at another university, mostly in a foreign country. The students of sciences made use of this opportunity less frequently, only 29.5 % of them studied abroad.

One of the obstacles that prevents a student to study abroad is weak command of English. This language has become a primary means of scientific communication and its command becomes a prerequisite to doing research. Therefore, universities provide courses to remove the obstacle that a student has little or no command of English (Pokrivčáková, 2017; Králová, 2018). However, it takes a longer period of time for a student to acquire at least the reading knowledge of the language. The courses are difficult for learners with no English basics.

Since the Czech University Law of 2017, PhD students are obliged to take an international study for a certain period of time. The study can be substituted, however, by taking part in conferences. Therefore, the universities offer the students mobility programmes as well as provide them English courses.

A job at a university

Though a doctoral degree is an entry ticket to a wide range of employment, receiving a job at a university was the target of most of the PhD graduates. As many as 68.2 % of the respondents in sciences and 63.6 % respondents in humanities were offered a job at a Czech university – and accepted it. They became university teachers, and thus set on a route in the hierarchy of university positions.

As documented by the participants' accounts in the qualitative part of the investigation, occupational adaptation and social identification at the workplace are closely connected with the university culture. The university culture, i.e., its traditions, symbols, and values, are vital to academic wellbeing because it provides stability and continuity. An institution's culture includes a complex structure of relationships, phenomena and everyday events, which gradually evolve and change. The university culture is demonstrated in its daily way of life, and it clearly distinguishes those who belong to it and those who do not. Experiencing a culture daily means sharing its ingredients and having a sense of belonging to the cultural community.

According to anthropologist White (1949), a culture is a system of symbols. Symbols are signs that are carriers of meanings in a given community. Symbols constitute an image of the institution, though culture has many more elements than symbols. For instance, Folch and Ion (2009, p. 146) delineate the university culture as a sum of convictions, values, behaviour, norms and symbols related to the following components: management, finances, research, instructional methods, teachers' profiles, evaluation, IT and the territorial growth of a university.

Prior to taking a job at a university, the study participants had a primary conceptualisation of the institution. For them, a university was an institution symbolized by the following:

- intelligence – *"it is a place for intelligence" (F7)¹,*
- silence – *"it is a space where nobody is shouting, where pupils do not rush along corridors" (F1),*
- possession of time – *"it is a place where I am the owner of my time" (F6),*
- collegiality – *"it is a place where I have colleagues and collaborators with whom I can discuss matters" (M1),*
- career growth – *"It is a place where I can grow professionally" (M2).*

Each of these quotes indicates an element of culture that the participants believed in when they were considering joining a university. The symbol *intelligence* represents a belief that a university is a place where there are people whose life goals are the support of education and the creation of new values. The symbol *silence* signifies a desire for calmness for work, absent of shouting children. The symbol *possession of time* signifies a belief that time is an asset that can be managed, e.g., one can keep writing as long as desired. The symbol *collegiality* signifies that a university is a place of mutual understanding and cooperation. The symbol *career growth* signifies a belief that a university is a place where the behaviour and actions of people are aimed at professional development and work satisfaction. It is a place where the material and financial conditions are good (though not superior), allowing freedom of spirit and cooperation in creating new values.

Traditions and history also buttress the university culture. The study participants were employed at universities with the following traditions:

1. Universities that have relevant historical traditions, sometimes referred to as "stone-built universities" (M1, M2, M3, F4, F5).
2. Universities that have little-to-no historical traditions, sometimes called regional or "redbrick" universities (F1, F2F, F3, F6, F7).

¹ The interview participants were coded F or M (female or male). The number specifies individual participants.

One important conclusion can be derived from the participants' accounts. If the participants graduated from a full-time study programme at a brick-and-mortar university, then they received a job at this university immediately upon completion of their doctorate. Typically, they were offered a job while still studying, which meant that their adaptation to the university milieu was quicker than that of PhD graduates who took jobs after the completion of their studies. They knew the norms and rules of a university, so they transferred from full-time to part-time study. The cost of this job was the prolongation of their study. Their occupational adaptation and social identification was quick, and it influenced the course of their doctoral studies.

A half of a year into my doctoral studies, I went to an interview for a job at the department. I became a university teacher. Therefore, I switched to part-time study. Consequently, I became a member of the department from the very beginning of my doctoral studies and I had responsibilities as others had. I had a lot of tasks, and they started to accumulate. I was responsible for outreach courses, which I enjoyed, and I also did things like ERASMUS visit coordination, timetable management and the like. In addition, I had to work on my PhD. This was very demanding, it attacked my brain. One had to concentrate to manage the role of a teacher, then the role of an administrator. Only then did I have time for my PhD. (M1)

My studies lasted seven years. But during it I learned to think more thoroughly, I changed my original doctoral research project. Incidentally, I came across people who inspired me. (M2)

Those study participants who started their teaching careers at a regional or "redbrick" university first completed their PhDs and then went to the job interview, which they won. Frequently, these participants studied part-time.

I was waiting for an opportunity to apply for a job at a university. (F2)

I wanted to quit teaching at the [primary or secondary] school, so a PhD was an entry ticket to the university. (F2)

The job they received after their PhD was the first occupation in their career. In academia, they came across many factors they had to take into consideration.

Their conceptualisation of a university deviated from reality because they were unable to get a real picture of it (of its culture) in the course of their doctoral studies. The part-time study distorted the reality of a university.

Such findings are similar to those of Folch and Ion (2009) in their study undertaken in Catalonia. They describe two levels of the culture of a university. The first level concerns the functioning of a university as a whole. The structure of a university is determined by historical and regional traditions. In turn, these traditions are affected by political and institutional factors. The second level of the university culture is the creation of its values and supporting its role as a research

institution. However, research is separate from instruction. A researcher and a teacher do not constitute an integrated whole. Similar ideas could be identified in the accounts of this study's participants.

The participants explained that teaching and organizational tasks dominated their initial years at the university. Researching was suppressed, while teaching was given preference. This picture was identical both in participants in stone-built and red brick universities.

On completion of my master's I started the doctoral programme chiefly because there was no one to teach sociological courses. As a full-time student, I could not teach 10 lessons per week so I transferred to part-time study. All responsibilities began to accumulate: workplace tasks, accreditation documents, teaching and the like. It helped me to mature, but there was no time for doing research. It did not change after completion of the doctoral programme. I do not teach less, and organisational tasks have not decreased. Although my research has been postponed, thanks to more favourable circumstances I would actually have time for it. (M2)

A university culture is also formed via teamwork. Collegiality can be deciphered in official university documents, but it also appears in a department's climate. The participants reported that the need for teamwork and the search for human interaction were important components of their workplace identification.

Sorry to say, if the climate is inappropriate, the work performance decreases. (M3)

Workplace climate is created by a pressure-free environment. (M1)

Team work helps me, so I often sit with colleagues at the office and we think, speculate, discuss things, and write... For me it is vital that next to me there is a friendly person. (F1)

Teamwork strongly supports the university culture. At those universities where teamwork is well established, the employees take it for granted and, in fact, they do not scrutinize it. A high level of identification with an institution can be conceived as a result of a melting pot of values, traditions and practices.

The work achievements of employees are determined by understanding the colleagues and their work cooperation. This was confirmed by Simplicio (2012), who claims that it is appropriate if young teachers learn to communicate effectively with older colleagues who already possess experiences and hold positions. They must also learn to effectively interact with colleagues to ensure that the mission of the institution is fulfilled and that students' needs are properly met. Simplicio refers to experienced academicians as "guardians of the culture" who work to maintain it and its delicate balance. "They are the keepers of the traditions and protectors of the history and culture of the institution. These individuals include veteran faculty members, entrenched staff members, and

others with longevity and seniority. They stand watch over the status quo, they begrudgingly allow only the most necessary of changes, and they usher in newcomers and indoctrinate them into the field" (Simplicio, 2012, p. 237).

In order to be successful within a university, a PhD graduate must learn to efficiently work with individuals, whose standing often gives them instant credibility within the professional community. If a university lacks these individuals, young people cannot observe important social models that help them to learn the academic culture.

Social isolation is the reverse of culture. Isolation can be perceived from two different perspectives, as a positive or as a negative characteristic. The study participants reported that their participation at conferences organized in the Czech Republic was rated low by the Czech Ministry of Education, therefore they avoided them. By this they isolated themselves from the professional community.²

Currently they make us isolated individuals. Unfortunately, the virtual environment has begun to be used also in academia. (M3)

Therefore, the participants much appreciated any chance of interaction with members of the professional community at conferences – if such chances existed. They considered such interactions important for their personal growth. They felt that written communication cannot substitute for face-to-face contact.

I wish there was a duty to participate at conferences. I am very grateful I have had such opportunity because it forced me to cultivate both my oral and written communication. I was learning how to cope with stress. (F6)

The opposite pole of conceiving social isolation is appreciating it. Solitude is needed if an individual works on studies and articles. The participants looked for undisturbed opportunities to work. In this respect, social isolation is a favourable matter.

When I am writing a text I want to be on my own and I seek solitude. Otherwise, I will fail. Right now, I received a review of my manuscript and I have to revise it. I am working on it vigorously. But occasionally I feel that events bother me, they interfere with my privacy. On the other hand, I cannot avoid it. (F1)

Folch and Ion (2009) conceive isolation as a kind of manifestation of freedom. Solitude is a precondition of teachers' activities. It is a necessary element for concentration on work tasks.

² Participation at Czech conferences brings few credit points, thus little money to a university, in contrast to international conferences.

When I came to the university I loved to teach. But now it has changed a little. I need peace for writing. I am scared when students come and go, and this bothers me. I wish I had more freedom for quiet writing. (F2)

Social isolation, then, can be both a prison and a place of asylum. Sometimes teachers separate themselves from students and immerse themselves in their thoughts. Others literally fight for contacts with colleagues and for cooperation in order to be productive.

Postdoc ambitions

The present investigation was also targeted on postdoc ambitions of PhD graduates. After the student received the PhD diploma, he/she may decide about a next step in the professional career. One of the routes to be a highly qualified researcher is to take a postdoc position at a university. As many as 83.3 % graduates in sciences and 81.4 % in humanities in our sample had an ambition to take a postdoc position - but only a small portion of them have this ambition fulfilled. Postdoc positions are scarcely offered to PhD graduates by universities or research institutes (like academy of sciences). Interestingly, no respondent had an ambition to take a postdoc position abroad.

Graduates who did not become academics started jobs offered in the labour market. Graduates in sciences listed 47 jobs, mostly in private businesses, ranking from employees to managers. Those who completed the PhD programme in humanities listed 36 different jobs as different as business analyst, financial manager, primary school teacher, press secretary, or senior citizens home manager. Only one graduate stated he is unemployed (PhD in archaeology).

Conclusion

The interviews support the finding that the main reason to enter into the doctoral programme was not to become teachers or researchers but to get a job at a university. A PhD was an entry ticket to employment in academia (Wiegerová, 2016).

Why was a university considering their career target? As it appeared in the study participants' accounts, the key reason was the professional status they gained by becoming university teachers, a position much valued within their social setting (family, friends, and the community). The professional status was more appreciated than the salary, which is, by the way, not high if compared to other highly qualified employees in the Czech Republic. Furthermore, they witnessed that a university offered them intellectual liberty, spiritual freedom and opportunity for self-improvement. The latter was not associated with knowledge and skills to conduct research. A researcher was not described as a career target.

Another point worth discussing is the position of postdocs. Generally speaking, a postdoctoral position is a temporary post in which a PhD graduate receives

continuing training in research. A postdoc position is a transitional post to a permanent career in academia or other higher institution. In contrast to the science, Czech universities offer very few postdoc positions in pedagogy. Postdoctoral practice and training provide a young researcher developmental opportunities. This requires that university has specialists who concentrate on supporting the professional development. Many universities in other countries nominate postdoctoral trainees and offer a special programme concentrating on those who guide the postdoc throughout their programme. A good example is the University of Alabama at Birmingham (Lorden & Matalon, 2002, p. 49).

References

- AKERLIND, G. S. (2008). Growing and developing as a university researcher. *Higher Education*, 55(2), 241-254.
- DAVIS, G. (2013). *Advising and Supervising Doctoral Students: Lessons I Have Learned*. University of Minnesota. Retrieved from http://misrc/umn.edu/workingpapers/fullpapers/2004/0412_052404.pdf.
- FOLCH, M. T. & ION, G. (2009). Analysing the organizational culture of universities: Two models. *Higher Education in Europe*, 34(1), 143-154.
- GARDNER, S. K. (2007). "I heard it through the grapevine": Doctoral student socialization in chemistry and history. *Higher Education*, 54(5), 723-740.
- JARAIM, D. & KAHL, D.H. (2012). Navigating the doctoral experience: The role of social support in successful degree completion. *International Journal of Doctoral Studies*, 54(7), 311-329.
- JEFFERSON, G. (2004). Glossary of transcript symbols with an introduction. *Pragmatics and Beyond New Series*, 125, pp. 13-34.
- KOSOVÁ, B. (2013). Vysokoškolské vzdelávanie učiteľov na Slovensku. *Pedagogika*, 63(4), 485-500.
- KRÁLOVÁ, Z. & MALÁ, E. (2018). Teaching foreign languages in Slovakia (1918 – 2018). *XLinguae*, 11(4), 11-21 ISSN 1337-8384.
- LORDEN, J. F. & MATALON, S. (2002). Easing the perils of the post-doctoral years a call for institutional attention. *Change*, 34(1), 44-49.
- MAREŠ, J. (2013). Neviditelná skupina aneb co s postdoktorandy? *Pedagogická orientace*, 23(1), 5-26.
- McALPINE, L., JAZVAC-MARTEK, M., & HOPWOOD, N. (2009). Doctoral student experience in Education: Activities and difficulties influencing identity development. *International Journal for Researcher Development*, 1(1), 97-109.
- MELIN, G. (2005). The dark side of mobility: negative experiences of doing a postdoc period abroad. *Research Evaluation*, 14(3), 229-237.
- MILES, M. B., HUBERMAN, A. M., & SALDANA, J. (2014). Qualitative data analysis. 3rd edition, Los Angeles: SAGE.

- NEUSAR, A., CHARVÁT, M. et al. (2012). PhD existence v oboru psychologie v České republice a na Slovensku. Olomouc: Filozofická fakulta Univerzity Palackého.
- POL. M. (2018). Doktorandi na univerzitách. Zlín: UTB – prednáška pre študentov v rámci konferencie Fórum mladých výskumníkov.
- POKRIVČÁKOVÁ, S. (2017). Evaluating CD ROMs for Pre-Primary English Courses in the Czech Republic and Slovakia. *Language, Literature and Culture in Education*, 4(2), pp. 3-23.
- POPE, C., ZIELBAD, S., & MAYS, N. (2000). Qualitative research in health care: Analysing qualitative data. *British Medical Journal*, 320(7227), 114-116.
- SIMPLICIO, J. (2012). The university culture. *Education*, 133(2), 336-339.
- ŠEĎOVÁ, K., ŠVARŤÍČEK, R., SEDLÁČKOVÁ, J., ČEJKOVÁ, I., ŠMARDOVÁ, A., NOVOTNÝ, P., & ZOUNEK, J. (2016). Pojetí výuky a profesní identita začínajících vysokoškolských učitelů. *Studia paedagogica*, 21(1), 9-34.
- TURNER, G. & MCALPINE, L. (2011). Doctoral experience as researcher preparation: activities, passion, status. *International Journal for Researcher Development*, 2(1), 46-60.
- VEKKAILA, J., PYHÄLTÖ, K., & LONKA, K. (2013). Experiences of disengagement – A study of doctoral students in the behavioral sciences. *International Journal of Doctoral Studies*, 54(8), 61-81.
- WIEGEROVÁ, A. (2016). The careers of young Czech University Teachers in the Field of Pedagogy. Zlín: UTB.
- WIEGEROVÁ, A. (2017). Career Plans of Novice University Teachers: The Research Perspective. *Acta Technologica Dubnicae*, 7(1), 9-26. DOI: 10.1515/atd-2017-0001.
- WHITE, L. (1949). *The Science of Culture: A study of man and civilization*. New York: Grove Press.
- Zákon o vysokých školách 137/2016 Sb.

Contact

assoc. prof. Adriana Wiegerová, PhD.
Department of School Education
Faculty of Humanities
Tomas Bata University in Zlin
Štefánikova 5670
760 01 Zlín, Czech Republic
wiegerova@utb.cz

Fundamentals of Mathematical Knowledge in the Traditional Culture of Evenks

P. P. Khoroshikh^{1,2}, A. A. Sergievich^{1,2}

¹Far Eastern Federal University, Russian Federation

²Far Eastern Regional Scientific Centre of Russian Academy of Education,
Russian Federation

khoroshikh.pavel@inbox.ru

Abstract

This article is devoted to an analysis of the main mathematical concepts of one of the indigenous peoples of the North: Evenks. This is the first attempt at the systematisation and understanding of Evenks' accumulated stock of mathematical knowledge. The study has shown that the total mathematical knowledge of this group underlies the sociocultural environment and traditional way of life. The main function of mathematical concepts is to give information about the number of animals in the camp, and to specify the direction of movement during hunting. In addition, it is noted that mathematical representation is closely interrelated with the general knowledge about the world. The selection of separate groups of numerals allows the author to specify the area in which they are used. Common geometric representation is reflected in the applied art.

Key words: evenks, ethnomathematics, folk traditions, folk education, North culture

Introduction

The idea that mathematics belongs to the cultural sphere finds its confirmation in the studies of modern researchers, in which they reveal and study the peculiarities of mathematics in different ethnic groups. Nowadays, papers of this kind are united into one group of investigations, named 'ethnomathematics'. This term appeared in the second half of the previous century for the first time in the works of the Brazilian mathematician D'Ambrosio, who used it in different, but sufficiently close meanings: as a complex of mathematical practices in different cultures (national-tribal, professional, age-related and. etc); as a specific instrument of coding, permitting the members of this or that cultural group not only to describe, but also to comprehend the reality and to control it; as a certain system of styles, techniques, methods, forming in this or that culture, directed to the comprehension, explanation and (if necessary) to the change of the natural and social environment (Evstrop'eva, 2013).

In recent years, D'Ambrosio (Rosa et al., 2017) and many other scientists, based upon the concepts of ethnomathematics, have developed it as an exploration programme in the fields of philosophy, epistemology and the history of mathematics (and, more broadly, natural science). They pay attention to its practical ways in education, particularly for teaching and instruction in schools and universities.

The study of the elementary mathematical ideas of the native people of the North, where the social-cultural environment and the ethnos exerted the essential influence on the forming of the mathematical knowledge, is of great interest. Of particular significance are the investigations of the Evenk culture. The Evenks are the indigenous people of the Russian Federation. They inhabit the extensive territory from the left bank of the Yenisey in the west to the Sea of Okhotsk in the east. The southern settlement boundary runs along the left bank of the Amur and the Angara. According to the administrative division, the Evenks settled within the boundaries of Irkutsk, Amur, Sakhalin regions, Republics of Yakutiya and Buryatiya, Krasnoyarsk, the Trans-Baikal and Khabarovks territories. The Evenks also live in Tomsk and Tyumen' regions. They have never constituted the majority population on this vast territory. They live in the same settlements with the Russians, Yakuts, Buryats and other nations. They also live in Mongolia and in the north-east of China.

The Evenks are an ancient indigenous people of Eastern Siberia, including the Baikal region. Scientists consider the uniqueness of this nation to be in its extensive settlement in small groups on the huge territory of the Eastern Siberia and Far East. The centuries-old development in the huge icy area caused not only the original way of life, but the accumulation of the definite practical knowledge specific for this nation, which was improved during the process of its transference from one generation to another. The Evenks developed the ideas about the directions of the cardinal points and the original calendar; the count system and the ability to operate with numbers were developed; they developed in detail the practically necessary small measures of length. The long way of experience and observation helped them to master unconsciously some laws of motion (for instance, about bows and crossbows) and the material properties (for instance, of spruce, birch, burl and others), which they used for various handcrafted items.

Formation of numeric signs

During the development of the taiga wilds, the Evenks developed their own system of signs and pictures, which allowed them to communicate with each other. Middendorf encountered among the upper Amur Evenks and in taiga too the pictures of horses and deer's heads and the sign on the trees' slices which offered to look for the escaped horse or deer. A sample of this pictorial writing is kept in the State Museum of Ethnography of the People of Russia (coll. № 1763 – 5). Most

often, the different placement of arrows, branches and moss served as signs: the moss placed near the trunk on the knot (*legdeke*); the abatis (*samelki*); curved or slightly undercut branches (*sugisikta*); the picture on the trim place or on the birch bark, hung on the bough (*onevyn*) and the picture on the ground near the wood base (*onyvyn*). For instance, a branch thrust obliquely into the abates with its top upwards meant that the hunters went far away; sometimes they made notches on the branch according to the quantity of rivers over the distance they migrated; a notched branch horizontally thrust into the abates was the sign that in the direction of the top over the distance of as many as rivers there is a camp of nomads; the branch with the curved and strengthened top and with the marks, horizontally thrust into the abates meant that there was the definite quantity (according to the quantity of marks) of raw-hide tents. Some moss, placed on the branch stub, to which the branch was accreted, symbolised the killed animal (Tishkovet al., 2015). And the 'arrow' of the branch indicated the direction where the kill was. The log lying across two wood stripes of the raw-hide tent at the entrance meant the interdiction to use the raw-hide tent (or its carcass). The Evenks used special signs (ideograms). Thus, there were the special signs for river, mountains, expectant women, migrating, hungry trade life, satisfied trade life (in the first case, with the edge of the knife up; in the second case, with the edge of the knife down).

It was mentioned in the first work in the history of Russia devoted to grammatology (the science of writing systems, Kondratova's 'Book about letter' (1975). The author writes that the Evenks used special signs for counting: the vertical line meant one, while a cross indicated ten; usually for counting they used a wooden block. The special signs for numbers (the numbers are classical samples of ideogram, which can be read in any language in its own way), existed in the nations of Mansi and Khanty, living to the west from of the Evenks, in the region of the Ob North. For instance, Kazymskiy Kants have a 'cross' (like the Evenks do) denoting ten, a 'star' denoted a hundred, the 'ellipse with the cross in it' denoted five hundred, a 'circle with the cross in it' – a thousand (Podmaskin, 2008).

Karasev wrote in 'Grammatological dictionary' that even non-literate people had numerical characters or mnemonic symbols for writing: labels, lines and cuts, among early Slavs. According to the author, Evenks, Khantys, and Mansis denoted ten as a cross, one hundred as a star, and five hundred as an ellipse with a cross in the middle (Vampilova et al., 2013).

Thus, the conclusion can be preliminary made that the Evenks had their own group of numerical characters.

Numbers in traditional culture of Evenks

Numbers have a distinct importance in the Evenk culture; like many other nations of the world, they had their own notions about the numbers, in which their unique culture was reflected. In their religious faiths, they worshipped some

numbers. The Evenks conceived of three worlds: the upper, the middle, and the lower. The situation during the shamanistic rituals in the Western (to the West from the line of Lena-Baikal) and Eastern (Baikal-Amur) Evenks was different. Number seven and its divisibles predominated in the Western Evenks; number nine predominated in the sacred groves of the Eastern Evenks. Extremely interesting is the description by Anisimova of the clothes of the future daughter-in-law in the Olenekskiy Evenks, whence it follows that the Evenks realized that the odd numbers “chorbohtookh byolar” (may be with excess). Thus, ‘daughter[s]-in-law should wear the dresses in three layers. The bottom of the overdress should be served round with the fur skins. It was required from the future daughter-in-law the odd number of the fur coats -7-9, the odd number of deer -117 or 201’. The Evenks called the odd number **kelteme**.

Ibrahimov asserts that all the world religions pay special attention to the mystic-philosophical comprehension of the number category, to the identification of its role in people’s life, to the grounding of religion basis with the help of number category. For example, the author refers to the Pythagoreans and Eleatics, forming the system of their philosophy on the sacralization of the number category and confirming that ‘the world is in control of numbers’; the ancient Egyptians, Yahudis, Chinese, in whose mythology and religions the number category always played the essential and sometimes the extraordinary role. Ibrahimov considers interesting the fact that in spite of all the differences in culture, language, life experience, practically all the nations populating our planet, as the fundamentals are the same numbers, mainly short, at that even their magical status sometimes coincides. For example, the most significant numbers with their variations are the numbers one, three, five, seven, and nine.

In that context we shall introduce the numbers from one to ten in Evenk culture and folklore:

1. –*umun, umuken* ‘one’ – a man has one life, there is a proverb: *umun umukta sin umun* (liter. ‘One egg is nothing’), meaning that man has only one life; *umun umukta idu-de neni budyn sin umun* (liter. ‘One egg, wherever it falls, death is the only’); in the Evenk folklore there is a one-eyed supranatural ferrous monster, with the one weakness – its eye.

2. –*dyr* ‘two’ – two boys and two girls took part in the shamanistic ritual ‘acquisition of the childish souls’. The shaman in his singing described his march to the souls’ world. The souls in the kind of birds flew from one branch to another. The shaman, creeping up, started playing with the birds, unnoticeably hid one of them and quickly descended to the ground. At that moment children were standing near the shaman in the raw-hide-tent and keeping the white kerchief in their hands, at which they put the souls-strands of fur. In folklore two is a pair, a couple, body parts: hands, legs, eyes, ears etc. ‘Two bears pull the rope from each other, but can neither take away, nor outbalance’ (potakyi – the onerary bag on the deer),

'Two deer stay nearby, remove their clothes for winter and in spring they again grow up' (antlers).

3. *ilan* 'three' – the souls' feeding happened three times, any stamping ground was passed round three times. In the legends about the bogatyrs Irany, Umsulikene and Magikdun, the heroes marry to the three daughters of the Sun; at the ceremony of bear's head eating, the vessel with the dish detoured on the circle three times and the repast finished; during the divination shaman threw the beater three times towards the querent, observing the way it fell down.

4. *dyrin* "four" – the four directions of cardinal points; there is the written presentation about four "grounds" among the Ilimpiyskiy shamans – the worlds in the form of the square planes situated one above another; the shaman put the picture of the ancestor on the sacrificial deer's back, then passed the deer round the raw-hide tent four times, made a fire and put four columns around it – *tegeldyn*.

5. *Tuna* "five" – there are five fingers and five toes. The Evenks know the fairy tale "*Heladan*", about an old man and his five daughters, whose names correspond to the names of five fingers.

6. *Nunyn* "six" – *Nungurdok* – the name was derived from the number six. This name is often met in the Evenks's legends. The hero with alike name has six plaits.

7. *Nadan* "seven" – everyone should know the seven generations of their ancestries. The special maternity dwelling for women, the hut – in summer and raw-hide tent in winter, should have had seven poles (three of which are main); there is a phraseological phrase "Umbilical cord of the country is the Seven seas" (*nadan buldar chulurun*), denoting the foremost in this country; so as to recover and become the greatest narratress of folk tales of the Nymngakanes, K.P. Afanasyeva, when a child, at the instance of the shaman Vasiliy Fedotov, should have been singing during seven days; besides, the number seven often occurs in the Evenks folklore: the seven Udagankas, the seven thousand people; the seven ravines of the Upper Mayan (the Upper Mayan is the layer of the sky, where the Divinity Mayan lives), the seven ravines Yuri Yulten (Yuri Yulten – the land of the Rising Sun), the name of the hero Nadan nadarmachan Sekakindiya – Semizhdy braided Sekakindya (verbatim, having seven parallel tressed braids; Serezhka (from sekan – earring)). The Evenks birars called the Galaxy Constellation as Nadan unil (seven maidens) (Dyachkovskaya, 2014).

8. *Daypkun* "eight". The ritual *ikenipke* in the Symsk group of the Evenks, surviving to the XXth century, presented the ancient eight-day hunting mystery-chase for the divine poroz (deer), its killing and inclusion to its meat. There is a mention about the octal dwelling in the folklore of the Evenks – *chorama* with the exit through the smoke flap. The memorials about the *chorama* dwelling were kept in the beginning of the XXth century among the urmiysko-amguno-chumikanskiy Evenks. The word *chora* names the pole of the cylindrical part of the raw-hide

tent's carcass like the Chukot yaranga. According to the reports of the Amgun Evenks, the raw-hide tent – *dykcha* earlier was named *chorama*. Now this term is forgotten and is kept only in legends; in the folklore of the eastern Evenks "Narration about Chinanay's Son" there is a mention about Dyapkalta – an old man, having eight heads.

9. *Egin* "nine" - some shamanistic rituals were carried out nine times. The upper shamanistic world (*tymanitki*) located above nine (seven) clouds of the sky over the origin *endekit*: below the ninth (fourth) level (the low world) only the very strong shamans went; the middle-Aldan Evenks during the hunting kept the tradition of division of the bagged animals head into nine parts.

10. *Dayn* "ten". It is narrated about the ten-legged deer in folk tale "Nemelon", "*Murivyl*" is the tale about ten sisters, whose names are derived from the numerals: *ymyn* – *Ymynmek*, *der* – *Denmekyye*.

Peculiarities of numbers formation in Evenks culture

Numerals, quantity play important role in the life of the Evenks. Measure words in the Evenks language comprise a broad stratum of the dictionary. As Podmaskin notes, the Evenks counting is concerned with the definite subjects and is necessary for the account of the bagged animals, tributes, tributes paid off the furs, taxes and dues, for change, purchase and sales, and also for determining the man's age. There were different ways of counting: by threes, by fives, by tens. It is possible that in the name of number fourteen *dyr nadar*, "two sevens", the trace of the counting by sevens was kept. In the Barguzin and Nercinsk dialects, number twenty has another name – *orin*, *orini* twenty pieces (Nevel'skoy, 1947).

The numerals in the Evenks language express the existing countable system, the units of this system. The countable system, as all the nations of the Altaic family have, is denary. The units from one to ten had its own names: *umun*, *umuken* "one", *dyr* "two", *shish* "three", *dygin* "four", *tyntza* "five", *nuyyn* "six", *nadan* "seven", *dypkun* "eight", *egin* "nine", *dyn* "ten". A hundred had a specific term – *nyma*, *nymadil*, the name of the number one thousand was absent. These eleven words and the word "tysyacha", adopted from the Russian language, in combination can express the whole infinitely many numerals.

But it's necessary to pay attention to the fact that according to the Tungus-Manchurian comparative dictionary of V. Tsintius, one thousand and ten thousand in the Evenks language has their own names: *miuan*- "one thousand" (and in many Tungus-Manchurian languages *ming-kan* means one thousand); *tuman* – "ten thousand" (and in many other languages *tymy*, *tyme*, *tymen*, *tu'-man* mean ten thousand).

The numbers of the second order are formed by coufounding of the number *dyn*, **ten** with the numbers of the first order. Number ten is put on the first place and the numbers one, two, three etc. are joined to it. The number ten and the joined

numbers of the first order are not changed. The numbers of the second ten are *dyn ymyn*, *dyn dyr*, *dyn ilan* etc. But the numbers of the second ten, besides the generally used (like “ten one – eleven”, “ten two – twelve”), have some different forms in the dialects of the Evenks and Evens. In some dialects of the Evenks, living on the Lower Tunguska, the numerals of the second ten differ by the fact that number ten has the suffix of the deponent case – **dyk**: *dyndyk ymyken* -11, *dyndyk dyr* - 12, *dyndyk ilan* - 13 etc. (verbatim, “one from ten”, “two from ten”, “three from ten”). The Southern form, like “one is odd from ten” or “one above ten”, is specific for the Chukchee-Koryak languages (Belyanskaya, 2013). Among the Evenks dialects, it’s (“from ten one – eleven”) spread in the region of the right upper inflows of the Aldan, from where it was brought by the Evenks groups, coming to the west from the upper reaches of the Vilyui to the North from the Lower Tunguska. This form was also met in the certain dialects of the Nenec language. In the dialects of the Evenks, living along the Stony Tunguska, the numerals of the second ten are formed from the numbers of the first order with the suffix – **delyke**, which was formed from the suffix of the ablative case and the word *kheleke*: *ymykendeleke* — 11, *dyrdeleke* — 12, *ilandeljekje* - 13 etc. The numerals of the second ten in the dialects of the Evens of Kamchatka are formed likewise: *umjen’ uljek* - 11, *djurdi uljek* — 12 etc. (verbatim, one is odd, two is odd”). The Yenisei form like “one more than” was peculiar for all the descendant of the Angarsk Tunguses, settled along the Stony Tunguska, the Yenisei, its left inflows, and also on the Okhotsk coast. The Eastern form like “ten one over” was significant for the Yukaghir and Eskimo languages and also for the Even dialects of the Yana and the Okhotsk coast (Razumovskaya, 2014).

The name of the full dozen is also formed from the numerals of the first dozen. The name of the relevant numbers of the first dozen is set on the first place; the numeral *dyn ten* in plural is set on the second place. The numeral *dyn* forms its plural form as all the nouns ending **n**: *dyn ten* – *dyr dozens*. The full dozens: the numeral *djurdjur* (20) simply means – two dozens, *ilandjar* (30) – three dozen etc.

The counting within the dozens is carried out by the way of the simple adding of the numbers of the first dozen to the names of the full dozens: *djurdjur umukjen* - 21, *ilandjar nadan* — 37, *njunjundjar djapkun* - 68 etc.

The names of the full hundreds and full thousands are formed by putting *njamadi* before the words and thousand of numbers of the first dozen: *umukjen njamadi* – 100, *dygin njamadi* – 400 etc. When counting is over ten thousand, before the word thousand they put the numbers of the second dozen in sequence, full dozens: *ilan tysjacha* – 3000, *djundjur tysjacha* – 12000 etc. For example: 15612 – *djan tuna tysjacha njunun njamadi djan djur*.

Main groups of numerals in Evenks language

In the study guide "The Evenks Language" the authors distinguish the following categories of numbers: cardinal, ordinal, reiterative, distributing, multiplicative.

The cardinal numerals mean the number of subjects. They unite the names of units, dozens, hundreds, thousands and all the complex and composite numbers of the Even language. This category of the numerals can define not only the quantitative feature of the subject, but also the abstract number. It answers the questions *ady? oki? how many?* These numerals, as the nouns, may have the limitary suffixes – rikta, - riktje: umukjeriktje "only one", dygirikdje – "only four" etc.; concessive – *mat*, - *mjet*: umukjemjet "even one", djumjet "even two", ilamat "even three" etc. The cardinal numerals are declined like the nouns (Shelegina, 2006).

The ordinal numerals are the numerals which denote the order of the subjects. The ordinal numerals are formed from the basis of the cardinal numerals with the help of the suffixes *-i*, *-gi*. In modern language the suffix, forming the ordinal numerals, in its full form can be distinguished only in numerals above nine. The ordinal numerals are not derived from the numerals umun and djur *two*. They are changed by other words: njogu, jeljekjesipty – *the first*, ge – *the second*, another, ili – *the third*, dygi – *the fourth*, tunni – *the fifth*, njutzi – *the sixth*, nady – *the seventh*, djapki – *the eighth*, egi – *the ninth*, djagi – *the tenth*, djan umukegi – *the eleventh*, djan djugi – *the twelfth*, dyan ili – *the thirteenth etc.*

The ordinal numerals in many dialects are used only with the personal – possessive suffixes: ilityn – *the third*, dygityn – *the fourth*; tundityn – *the fifth* etc.

The reiterative are the numerals, which point out how many times the action takes place. It answers the question adyra? *how many times?* The reiterative numerals, except the number umne – *once*, formed from the basis of the cardinal numerals with the help of the suffix *-ra*, *-re*: umne, umneken – once, one time, djure – twice, two times, ilara – triply, three times, dygre – quadruply, four times, tuntzara – five times, njutzure – six times, nadara – seven times, djapkura – eight times, egire – nine times, djare – ten times, djan umukere – eleven times, djan djure – twelve times etc.

The distributing are the numerals, which point out how many subjects are taken. The distributing numbers are formed from the basis of the cardinal numerals with the help of the suffix – *tal*, *-tel*: umutel *by one*, djutel *by two*, ilatal *by three*, dygitel *by four* etc. The distributing numerals are inflected for case, as nouns with the suffixes of the plural. For example: Asatkar, ilkallu ilataldi. *Girls, stand by three*. Asatkar, gakallu ilatalva knigalva. *Girls, take three books each*.

Multiplicative are the numerals, used for denoting the quantity of the layers of tissue, leather, birch-bark and other subjects, which can be lined in layers. The multiplicative numerals are formed from the basis of the cardinal numerals with the help of the suffix *-man*, *-men*. When the suffix *-man*, *-men* is attached, the final

–*n* is not eliminated. The numerals are formed: umunmen **single**, djunmen **double**, ilanman **triple** etc. In some dialects the final *n* is replaced by the suffix of the plural –*r* and the following numerals are formed числительные djurmen **double**, ilarman **triple**, dygirmen **quadruple** etc. Examples: ilanmandi jellunmje chakilkal. **Put the covering for the yourt three times (in three rows).** Ilanmandu chakimnchjdu jellundu usikjen bichjen. **There was a belt in the covering for the yourt, laid in three rows.** Djunmjien udjalin imannadu ichjevchjel bichje. – **His double tracks were seen on the snow.**

Elementary geometric ideas of Evenks.

The elementary geometric knowledge, the Evenks had, are confirmed by the cultural artifacts, household outbuildings, household articles. The aesthetic needs played the main role in the development of the geometric ideas and terms of the Evenks: the desire to decorate the domestic implements, clothes and themselves. All these provided the formation and accumulation of geometric knowledge. As Vasilyevich notes, the Evenks displayed in the decorative art their extraordinary visual memory, observation, capability to embrace the exact characteristic and to describe it (Forsyth, 1991).

In the paper “Ornament of Siberia nations as primary source” (1963), Ivanov writes: “So as to create the simplest ornament, the figure of triangle with two equal sides, it’s necessary: 1) to observe the triangles have the same sizes and angles; 2) the distance between the triangles should be equal; 3) so as their peaks were oriented in the same direction; 4) so as the border of triangles was situated along the line or the correct contour”. The said above shows that at creating the ornament, the man is motivated not only by the characters and artistic excitement, but also by the feeling of measure, order and counting.

The decorative art of the Evenks was reflected in bone carving, wood and iron engraving, in making of the wooden figures, casting of the figures out of lead and strannum, in hammering of different subjects, in laying of the silhouette pictures on the wooden subjects with the paints, lettering on the birch-bark, in sewing out of fur strips and squares, in embroidering by the seam with the under neck white hair of the deer, by the seed beads, the engraving of the figures out of birch-bark (Golovnev, 2011).

The ornament of the Evenks was linear-geometric: lines, stripes, arcs or archlets, circles, alternate squares, triangles, rectangles, zigzags, cruciform figures. The process of taking out from the birch-bark of the triangles and ornament, constituted from the combinations of such removals was named duktyke. The straight whittled lines were called ugur (from ugu – “to cut straight lines”). The semicircles were named the same way as the action itself – tynire, and the ornament of semicircles – tyn irek. Another two curls were cut – djolog ien (the ram’s horn) and seli ien (mammoth’s horn, that is mammoth’s tusks). They were joined

with their ends into the definite picture. The Evenks attained perfection in the art of fur mosaic. The craftswomen composed the patterns out of fur pieces on the breast collars, coat backs, torbasses and carpets. For decoration of the fur clothes they combined the stripes of white and black fur. But the floral patterns and figures of animals are not alien for the ornamental art of the Evenks. The décor significs was determined by the nature cult (Vasilevich, 1963). The stylized figures of the wildlife are painted in the ornament: waves, clouds, plants, sometimes to the geometric ornaments they added the figures, the schematic drawings of the deer, bears, elks, musk deer, birds and men. There were the circles with a dot and without a dot in its center like rosaces on the clothes, the astral signs, the space symbols: the sun, the stars, world structure. The triangle ornament – the symbol of the female, associated with the ides and the cult of strengthening of the community's power.

There is a long range of symbols and allegory, which today one can read getting the certain information in the results of the decipher.

They carved the stencils of the birch-bark for cutting out of the textile applications to decorate the birch-bark vessels. The ornament was applied with the help of the knife on the bone plane items. The circles with a dot or the concentric circles were applied with the simplest improvised pair of compasses. The pair of compasses for drawing of the circles in the ornaments on the bone was called nabun.

Applying of ethno-mathematical knowledge in pedagogics

A riddle – tagivka, nonobko is one of the means of the folk upbringing in the ethnopedagogics of the Evenks. The riddles give a child the possibility to get the totality of data about the environment during the process of the dynamic mental activity that is essential in the intellectual upbringing. The Evenks riddle itself often suggests the subjects of the riddle. Thanks to it children use the riddles and games early enough, that promotes the language and intelligence development (Merlina, 2012).

Among the Evenks riddles they distinguish the riddles with numbers. With the help of these riddles the primary interest was arisen in children. For example:

“An old man, wandering under the ground, the human reindeer catches?” (seine) («Umukan atirkan, dunna hargildalin girkudana, ital nmrwotin doromiwiki» (Ircaciwun)).

“One man is the smartest among smart” (wit of a man) («Umukan baja hawaduk-ta hawa» (ila dalin)).

“Two men argue: I'll overtake you, I'll overtake you! (skis) (ur baja makkuscarabi sinawa bokondiqaw, bi sinawabokondiqaw?» (Kinqal)).

“Two elks graze on the hillside!” (ears) («Dur motil oijkodoro kaltirdu?» (Ser)).

“Two ravens compete and compete, but no one surpasses? (black spots on the hare’s pads) («Dur karal gukcanma, awgutin-mal awki suptira?» (Tuhaki koqnolin serdun)).

“Two brothers can’t see each other?” (eyes) («Dur pekipap men menmer alii icaldira?» (ehal)).

“Three men run, saying: “I’ll overtake, I’ll overtake, I’ll overtake; but no one outruns?” (skis and stick)) («bajal gukcandara, gundanal: bi Imptidam, bi huptidam, ni-da awki huptiwa?» (Huksilla, howgura)).

“Each of five men has a yourt?” (a glove) («tiptza bajal umutal dueil?» (Kokollo)).

“Ten men carry ten ice-cakes?” (nails) («Dan baja, dan dukawa idanara?» (ohiktal)).

“Ten valuable, the old woman was lowered down?” (Yellow daylight) («Dan dakaci dandurin atirkan bica?» (kagke)).

“Twenty men the brothers were with four hats” (fingers and toes) («Dur-dar bajal nakunahal bical, digin awucil?» (Halgar)).

“A wrinkled old woman lived with ten treasures?” (Cabbage) («Djan djakalkan djandjurin atyrkan bidechje»).

Rhymes from 1 to 10. The Evenks paid special attention to the intellectual upbringing of the younger generation in the folk system of upbringing and education. Children from the early childhood were fostered interest in counting. The child, learnt to talk, studied to count to 10. For it they had a special rhyme, which simplifies the memorizing of the number order by pronunciation of the thematic word, which started with the same syllable as the number (5, p. 186).

The rhyme was written by Vasilevich at M.Moldyakitov (9, p. 132):

Umun - umukta (one – egg)

Dur – dudukta (two – butterfly)

Ilan-ilagli (three – piglet)

Digin – dikəcən (four – fly)

Tunna – tuksaki (na – tuksaki (five – hare)

Nunun – nuriktə (six – hair)

Nadan – nanna (seven – skin)

Dapkun – daw (eight – boat)

Jəgin – jalwuka (nine – moss)

Dan – dantaki (ten – wolverine)

Games on counting. School-age children, who took part in economic life, mainly played the action-oriented games: balikat — blind man’s bluff; djekjekjet, tuksavki, dalundjavki — tag games; chukchjekjet, kopilkat, chanankat, amunchikat — game “Kites”; hjekuke-ininike — “hot – cold” – hidden object game; kirutkat, dojarukan, hjerjelibpiui – fishing out of the subject game. Among the Evenks childish games, they distinguish the games on counting, on quantity, which

promoted the counting development in children. The children of the stony-tungus Evenks played havsidugat. This game's aim was to toss-up the "small bottle" lupuri with the shovel. The wooden shovel havsidu had a short handle, but lupuri presented small bottle-shaped wooden figure with the lock of the underneck hair, clued to the beak. The person, who tossed up the more times, won the game. Another group of the Evenks named this game paksidu, a padded ball replaced lupuri. They also had the game kalikatkat, started with the holing of the wooden ball by the shovel kipakavun with a long handle into the hole. The person, who holed the more times, won the game. The shooting with the blunt arrows from the bow into the ice wall with the thickness about 2 m and height 1 m. The person who pierced the ice considered to be a winner. The shooting onto the pole – for game they chose the flat area on the snow, made the hole and in 50-80 feet away they drove a stake and they shot into the pole in turns with the blunt arrows. Shooting into the hoop or ball – they drew the line in the middle of the clean area, and in the end of the area the judge was with the hoop of willow. On a signal, he threw the hoop along the line. The players should have shot into the moving hoop. The person, shot more times with his arrows, was considered to be a winner.

Conclusions

Mathematics is the science the comprehension of which is impossible without sequential thought and skill to analyze exactly the events. The main aim of Mathematics was revealed by O.Shpengler: "Each culture has its own mathematics" (Dyachkovskaya, 2014). That's why the formation of the mathematical culture encourages the grounding of any other culture.

Mathematics and Mathematical culture are not the identical terms. Mathematics is principally scientific knowledge, culture include this scientific knowledge, but is not reduced by it. The term "Mathematical culture" is used to denote what way the person interacts with knowledge like mathematics and how Mathematics can influence the structure and inner world of the person. The term "mathematical culture" is significantly wider than just a system of mathematical knowledge, skill and attainments.

The comprehension of the mathematical components in representatives of low-numbered peoples of the North is based on the figurative presentation of the world around them, which significantly makes difficult the formation in them of the scientific worldview. Besides, the native language of the peoples of the North has practically no words, denoting the terms of mathematics and geometry. However, it does not exclude the absence of the ideas about the objects in them. Exactly the geometric component differs from other components of the natural-scientific worldview by the fact that it provides the appearance of the form-making image in consciousness, providing the "picture", entirely of reflection by the consciousness of the fundamental interrelation of the universe.

One of the researchers of the linguistic and scientific worldviews, Kornilov finds this interaction in the following: "Having the same substantial invariant for all people, the scientific picture of the world (SPW) gets in any national language the national form of expression by the formation of the national terminology on the mother-tongue of the native speaker of this language. The national language composition of SPW by no means touches upon the substantial part of SPW, but only adapts the universal knowledge to the needs of the concrete linguistic community" (Golovnev, 2011).

References

- Belyanskaya, M. H. (2013). Olekmensk Evenks: statistical, historical-cultural research. *Herald of North-Eastern Federal University*. №2, N.10.
- Dyachkovskaya, M. D. (2014). Ethno-mathematics of indigenous low-numbered peoples of North: historical, folklore and regional mathematical problems of Verhnekolymskiy and Nizhnekolymskiy ulus of Republic of Sakha. *Yakutsk*, p. 113.
- Evstrop'eva, O. V. (2013). Ethno-recreational potential of the Baikal region. *Geography and Natural Resources*. 34: 61. doi:10.1134/S1875372813010095.
- Forsyth, J. (1991) The Siberian Native Peoples Before and After the Russian Conquest" in Alan Wood, ed., *The History of Siberi*. pp. 69–91.
- Golovnev, A. V. (2011). The anthropology of motion: Historical methodology and humanities-related technology. *Herald of the Russian Academy of Science* 81: 380. doi:10.1134/S1019331611040022.
- Merlina, N. I. (2012). Folklore and regional mathematical problems of the Russians // Cheborsary. *Chuvash University*, 290 p.
- Nevel'skoy, G. I. (1947). Deeds of Russian naval officers in the extreme East of Russia, 1849-1855. *Ethnographic research prior to Shternberg* pp.134 - 157.
- Podmaskin, V. V. (2008). Folk knowledge of the Amur Evenkss. *Russia and ATR*. № 1. 88-101.
- Razumovskaya, V. (2014). Translating Aboriginal Siberian and Circumpolar Cultures in Russia. *Translators, Interpreters, and Cultural Negotiators*. pp. 190-212.
- Rosa, M., & Orey, D. C. (2017). STEM education in the brazilian context: An ethnomathematical perspective. *STEM education in the junior secondary: The state of play* (pp. 221-247) doi:10.1007/978-981-10-5448-8_11.
- Shelegina, O. N. (2006). Results and perspectives for studying adaptation processes in the sustenance culture of the Russian population of Siberia (18th — Early 20th centuries). *Archeology, Ethnology and Anthropology of Eurasia* 26: 116. doi:10.1134/S1563011006020113.

- Tishkov, V. A., Novikova, N. I., & Pivneva, E. A. (2015). Indigenous peoples of the Russian Arctic. *Herald of the Russian Academy of Science* 85: 278. doi:10.1134/S1019331615030181.
- Vampilova, L. B., & Manakov, A. G. (2013). Experience in historical-geographical zoning of Russia. *Regional Research of Russia* 3: 458. doi:10.1134/S2079970514010092.
- Vasilevich, G. M. (1963). Ancient geographic presentation of Evenks and pictures of map. *IVGO*. 95(4), 306-319.

Contact

P. P. Khoroshikh
Far Eastern Federal University
Vladivostok
Sukhanova str., 8, 690091
Russian Federation
mail: khoroshikh.pavel@inbox.ru

Metaphorical Nomination in IT Terminology in Lithuanian and English Languages

Vilija Celiešienė, Saulutė Juzelėnienė

Kaunas University of Technology, Lithuania

saulute.juzeleniene@ktu.lt

Abstract

Metaphorical nomination is peculiar in every language, it is related to reality and world view perception, it also reveals the traits of nation mentality. However, there are universal models of metaphorical nomination. In both languages, special concepts can be nominated according to similar areas, e.g. human body, its physiological and mental peculiarities, mode of life, fauna, flora, objects of natural world, etc.

The aim of this article is to analyse tendencies of metaphorical nominations in IT terminology in English and Lithuanian languages, reveal universalities and peculiarities of metaphorical nomination models. Research data of Lithuanian metaphorical terms and their English equivalents show that semantic loan-words constitute the major part of Lithuanian metaphorical terms. Consequently, their metaphorical meanings are borrowed but a substantial part of them are fairly motivated in the Lithuanian language and only a small part of them have a doubtful motivation. Having analysed various ways of metaphorical transference it is possible to claim that figurative nomination of concepts is the most universal with reference to flora names and items of mode of life. It is noted that there is a tendency to nominate concepts meaning particular objects in both English and Lithuanian languages whereas analogies of abstract things are less abundant.

Key words: metaphor, conceptual metaphor, metaphorical term, nomination, semantic loan-translation.

Introduction

Traditionally, metaphor is perceived as one of the tropes, as an ornamental aspect of language and play of words. Such perception of metaphor formed an attitude to consider it as a visual tool used only in a fictional text. Basically, scientific discourse is thought to be non-metaphorical. Yet the new attitude of creators of conceptual metaphor theory (G. Lakoff, M. Johnson) expanded the concept of metaphor considerably. According to them, human conceptual system acts metaphorically by nature and only due to metaphors we are capable of perceiving and speaking about abstract senselessly tangible things. This is why metaphor is firstly a phenomenon of thinking, it exists in a language just because we think metaphorically. Relationship between these two areas – specific (source)

domain and abstract (target) domain – constitutes the essence of conceptual metaphor (Lakoff, Johnson 1980). Conceptual metaphor is one of the conceptual forms or cognitive process when new concepts are expressed and formed and without which new knowledge is impossible to obtain (Papurėlytė-Klovienė, 2005, p. 44). Metaphor correlates with human ability to notice and generalise similarities between different classes of individuals and objects. People think and work under certain schemes – metaphors. The fundamentals of linguistic communication are created of similar schemes of concepts on the basis of which a person thinks and acts. The entire system of concepts is metaphorical. The representatives of cognitive linguistics substantiated a peculiar theory of metaphor (Lakoff & Johnson, 1980). They claim that metaphor is a linguistic reflection of the process of thinking, it is a way of thinking but not a language phenomenon. Metaphors exist in a language only because they exist in a conceptual system.

Thus, the eighties of the last century presented a different understanding of a figurative language, especially metaphor together with the abundance of related researches. With regard to this concept of metaphor, it is claimed that a scientific text is one of the most metaphorised. Metaphorical term nomination of various scientific areas got the attention of foreign (Sweetser, 1990; Boyd, 1993; Kuhn, 1993; Bradie, 1999; D'Hanis, 2002; Knudsen, 2003; Aubusson, Harrison, & Ritchie 2006; Andrade, 2010, etc.), and Lithuanian (Marcinkevičienė, 1994, 2006; Baltrušaitė, 1998; Marina, 2006; Stundžinas, 2006; Šeškauskienė, 2012; Vladarskienė, 2012, etc.) scientists.

According to Šeškauskienė (2012, p. 66), comparison of several languages or an attitude to a language (most frequently to English) by a non-native speaker exposes many cases of metaphor realisation, in other words – metaphorical expressions peculiar to different languages. Moreover, they reveal conceptualisation inherent for different cultures. Inter-language comparative researches of term metaphorisation enable to present useful insights about metaphorical nomination models determined by different academic cultures. Unfortunately, inter-language researches of metaphorical term nomination are not plentiful either in Lithuania or abroad. Marina (2006, p. 98–108) has researched English metaphorical technical terms and their equivalents in Lithuanian and Russian languages pursuing to find out their common and different semantic peculiarities. Šeškauskienė (2011, p. 46–60) has investigated tendencies of scientific text metaphorisation in English and Lithuanian languages in contexts where lemma „argument“, which is very frequent in academic discourse, is discovered. Valiulienė's research (2014, p. 207–219) includes comparative analysis the objective of which is temperature metaphors and their expression in Lithuanian and English languages. Volosnova (2003, p. 39–44) has analysed peculiarities of translation of metaphorical IT terms from English into Russian.

With the globalized world, not only do new ideas, inventions, developed devices, ICT tools etc., influence our lifestyle but the language as well. With the newly invented objects comes the need for finding new terms. Technical communication requires ordinary people to even get acquainted with some technical processes, have certain knowledge of their components and their application. We use computers on a daily basis, therefore, it is not surprising that even non-specialists can operate a number of professional lexical units that could have previously been regarded as purely specialized lexicon. "Metaphor is pervasive in everyday life, not just in language but in thought and action. Our ordinary conceptual system, in terms we both think and act, is fundamentally metaphorical in nature" (Lakoff & Johnson, 1980).

The aim of this research is to analyse tendencies of metaphorical nomination in IT terminology in English and Lithuanian languages, reveal universalities and individualities of metaphorical nomination models of different languages, their expression peculiarities with regard to concept level, identify the most frequent metaphorisation tendencies and areas of metaphor origins. Thus, the methods of this research are descriptive, comparative and analysis of conceptual metaphors. The object of this research is one-word metaphorical IT terms of Lithuanian origin included into *Enciklopedinis kompiuterijos žodynas* 'Encyclopedic Dictionary of Computing' (EKŽ) and their English equivalents in the following sources: *EuroTermBank* (ETB) and *Encyclopedia, The Computer Language Company Inc* (PCmagE) and *Computer terms, dictionary, and glossary* (CTDG). One-word metaphorical terms originated from terminalised words of a simple language are analysed. These terms are to be attributed to nominal metaphors. Such metaphors are primary as nominated scientific objects do not have other nominations.

The analysed *Enciklopedinis kompiuterijos žodynas* 'Encyclopedic Dictionary of Computing' (EKŽ) provides with 4,600 lexical unit descriptions. But it is relevant to mention that not only are computer terms or terms of Informatics described in the dictionary but also other words or their combinations usually visible on a computer screen are defined. They are names of instructions, buttons, notes in dialog boxes, short programme messages, directions, etc. Only one-word terms (nouns) are selected for this research, 917 of them were identified. 58 % of which are Lithuanian terms (not international), only 16 % from which are metaphorical terms. They appeared in terminology by the means of terminologisation when words from common language were provided with a special meaning in IT area. Thus, metaphorisation is not a very efficient way of creating Lithuanian IT terms. In this article, Lithuanian terms are compared with the equivalents found in English sources in order to discover the tendencies of IT term metaphorisation in both languages. The main focus is given on the expression analysis of the aforementioned terms in accordance with nominated word groups in pursuance

of disclosing metaphor source areas and determining the basis of metaphorical transference.

Theoretical background

The approach to metaphor has also changed since the second half of the previous century. It has long been viewed at as a literary trope used as an expressive means to enrich authors' style. It has indeed been studied but seemingly very unilaterally. The shift has occurred with the introduction of Conceptual Metaphor Theory as well as with some other precedent studies. Let us consider some definitions of metaphor of modern linguistics scholars (Tretjakova, 2013). Contemporary metaphor theory is based on the works by Max Black (1955). In his seminal article entitled "Metaphor", the American philosopher introduced the concept of assumptive frameworks or systems of associated commonplaces to describe how intuitively dissonant statements can be explained in understandable words and then shared with others using the traditional rhetorical device known as metaphor (English, 1998). Metaphor has gained overall interest in all spheres of our life: politics, law, military, economics, etc. and even in non-verbal communication (Forceville, 2002; Charteris-Black, 2005; Knudsen, 2003; Boyd, 1996).

Hence, metaphor is one of the means used by scientific community, which helps coordinate a language with the structure of the unknown world (Boyd, 1996, p. 359). Metaphor in academic language is frequently used due to its property to combine two concepts emotionally and logically. It provides with the opportunity to transfer the title of one object to the other object semantically giving the latter a new content. According to D'Hanis (2002, p. 2), one of the most significant properties of metaphorical terms, which have attracted scientists' attention, is that it can extend and enrich vocabulary. There occur cases in scientific language when it is not possible to nominate a new concept with certain new terms. In such a case, new concepts are nominated by metaphors. Baltrūnaitė (1998, p. 38) distinguishes one more major cause of metaphorical term emergence in scientific language, i.e. reduction of memory load and limitation of language tool resources. It is not appropriate to render every concept, which are abundant in a language system, by a different word. The author also accentuates that metaphorical terms are motivated words. Not only do they nominate a desired object but also the object's relation to other objects is determined, and the most important properties of the object are defined (Baltrūnaitė, 1998, p. 39). Consequently, metaphor informativeness is one more reason why metaphorical terms are tolerated in scientific texts. Analysing technological advancements in the area of information technologies and communications, de Andrade (2010, p. 5) noticed that metaphorical terms help the reader to perceive information better, define implicit things or objects, create and interpret their autonomous realities.

Due to frequent usage of metaphors in scientific texts, they are attributed long established meanings. Župerka (2000, p. 181) claims that words employed in the language of special areas become terms. Hence, the term made from metaphor acquires an exact meaning of a term, i.e. it specifies an understandable word or word combination for a specialist the meaning of which is transferred according to phenomena similarity, comparison and the performed function. Baltrūnaitė (1998, p. 38) states that there occur cases when a concept itself provides freedom for title motivation selection, and preference is not always given to essential properties. Nomination can be impacted by accidental associations, vivid imagination of the creator, e.g. *skraidančioji lėkštė* 'spaceship', *Aristotelio žibintas* 'Aristotle lantern', etc. Baltrūnaitė (1998, p. 38) shares the opinion that creating a metaphorical term the most essential properties possessing the most substantial information are selected. Henceforth, the reader has to be careful in perceiving and interpreting the thoughts of the author, freedom of his/her imagination in choosing style elements. Analysing metaphors in scientific discourse, Bradie (1999, p. 160) follows the opinion that metaphor helps understand what we did not know till then. Metaphor is not only comparison. It contributes to different understanding of reality. According to the author, metaphors are important when we want to express our thoughts and expand scientific theories (Bradie, 1999, p. 160).

Metaphorical terms belong to the group of linguistic (lexical, lexicalised, inanimate, dead, normative, etc.) metaphors. In comparison with artistic metaphors, linguistic metaphors are characterised by objectivity, lexical and contextual independence, systematicity, integrity, anonymity. In other words, they are lexical units which are understandable and recreated, used for various communicative purposes, have no fictional function and reflect common material logical relations (Stunžinas, 2006, p. 63). Linguistic metaphors are defined by nomination versatility, their common psycholinguistic quality is transference of the title of one object (phenomenon) to the other object (phenomenon) by similarity. In accordance with Marcinkevičienė (1999, p. 110), linguistic metaphor is very common, universal, constantly used, deeply penetrated into human consciousness, therefore it best reveals the essence of abstract concepts. Such metaphor becomes permanent in a language, however it often loses its expressiveness and figurativeness. This is a context-independent abstraction realised in particular metaphorical sayings (Pielenz, 1993, p. 71). Linguistic metaphor performs the functions of a primary word, i.e. a scientific object does not have another title. This is the difference between linguistic metaphor and metaphor in poetry. Metaphorical terms nominate special concepts according to certain associations (form, function or other similarity). During primary stages of terminology formation, supporters of cognitive theory considered metaphorisation as one of the basic sources of terminology. As Lakoff and Johnson

(2003) state, metaphor is not only the prerogative of writers or poets, it is employed by all language users. We metaphorise numerous phenomena, actions, processes on a daily basis. It is important to emphasize that sayings expressing conceptual metaphor are understood differently from the ones used in fiction where these sayings are not perceived as original, they are not even considered as metaphorical. In most cases, such metaphors are regarded as self-evident.

One of the main functions of metaphor is title transference of one object, action, state, phenomenon or their quality to another object, action, state, phenomenon or their quality. In metaphorisation, one object is named by the title of another object, a property or function characteristic to one object is transferred to another object. Motivation of metaphorical transference is generally based on similarity insight between two heterogeneous objects, phenomena or their qualities which have almost nothing in common in reality and belong to different classification groups. According to Baltrūnaitė (1998, p. 39), metaphorical terms in scientific texts are distinguished by their special meaning. One word or another is chosen as a term not by accident but with regard to certain similarity of phenomena or concepts. Sometimes only external similarity is sufficient for such term transference. It is important that an object (property, phenomenon) would remind another object (property, phenomenon).

Stunžinas (2006, p. 71) analysed metaphorical terms of construction and he determined that metaphorical nomination of attributes in terminology of construction proceeds according to qualities of household items and wildlife items. Features of external similarity to objects are characterised by metaphorical term components and surface properties are nominated metaphorically. Vladarskienė (2012, p. 90) claims that the science of economics does not contain many particular objects, therefore various objects related to phenomena, actions or their relationships are usually nominated. Therefore, metaphors are based on function similarity, various associations, original metaphors are abundant.

It is vital to mention that a substantial part of Lithuanian metaphorical terms is made up of semantic loan-words when metaphorical meaning can be borrowed from terms of other languages. In accordance with R. Stunžinas (2006, p. 68) data, more than three quarters of metaphorical construction terms in Lithuanian terminology correspond to terms of other languages, e.g. [gręžimo bokšto] *koja* – English *leg* [of boring tower], Russian *нога* [буровой вышки]; *kakliukas* – English *neck*, Russian *шейка*. Zaikauskas (2014, p. 82) considers metaphorisation as a specific way of translation of terms.

Although metaphorical nomination is diverse in every language and is related to reality perception and world view, it reveals the properties of nation mentality. On the other hand, there are universal models of metaphorical nomination. Both in one and the other language, special concepts can be nominated according to

similar areas, e.g. human body, its physiological and mental characteristics, mode of life, fauna and flora objects of natural world, mythical creatures, colours, etc.

Results of the analysis and discussion

It is essential to mention that analysing Lithuanian one-word metaphorical IT terms and their English equivalents an observation was made that in most cases terms preserved their metaphorical meaning in both languages, i.e. the equivalent of a Lithuanian metaphorical term is a metaphorical term in English. For example, Lithuanian term *krepšys* and English term *bag*; Lithuanian term *kaukė* and English term *mask*; Lithuanian term *lapas* and English term *leaf* and many others. Only few cases are to be mentioned when metaphorical nomination is more vivid in the Lithuanian language, e.g.:

(1) Lithuanian *grotelės* 'grilles' "nedidelių grotų pavidalo pertvara", 'a partition in the shape of small lattice' (LKŽ),

English IT term *number sign* "in some programming languages, the number sign (#), also called the "pound sign," is used as a not-equals symbol" (PCmagE);

(2) Lithuanian *papildinys* 'add-on' "antrininkė sakinio dalis, kuria pasakomas veiksmo ar būsenos objektas" 'a secondary part of a sentence by which the object of activity or condition is defined' (LKŽ),

English IT term *plug-in* "software that is installed into an existing application in order to enhance its capability" (PCmagE);

(3) Lithuanian *svetainė* 'reception room' "svečių kambarys, salonas" 'a guest room, salon' (LKŽ),

English IT term *website* "a central location of various web pages that are all related and can be accessed by visiting the home page using a browser" (PCmagE) and some others.

It was noted that figurative meanings of IT terms nominated metaphorically are unequally different from the original meaning in the researched material. Two groups of terms can be distinguished:

- when a figurative meaning is not greatly different from an original meaning and it is easy to predict what concept a word means. Therefore, motivation of metaphorical transference can be easily substantiated, e.g.:

(4) *lamer* "a stupid, inept, or dull person" (OED),

IT term *lamer* "a technophobic person or neophyte to computers and technology, as viewed by the technically competent who have little empathy for the novice" (PCmagE);

(5) *owner* “a person who owns something” (OED),

IT term *owner* “an owner is the individual, computer, or software program that created a file or document” (CTDG);

(6) *guest* “a person who is invited to visit someone's home” (OED),

IT term *guest* “a person who logs into a network or service that does not have a user account” (PCmagE), etc;

- when a figurative meaning is dissimilar to the original meaning then it is complicated to predict what concept a word means, e.g.:

(7) *thread* “a long, thin strand of cotton, nylon, or other fibres used in sewing or weaving” (OED),

IT term *thread* “a programming structure or process formed by linking a number of separate elements or subroutines, especially each of the tasks executed concurrently in multithreading” (OED);

(8) *fold* “a form or shape produced by the gentle draping of a loose, full garment or piece of cloth” (OED),

IT term *fold* “an invisible line on a Web page that is at the bottom of the first full page on screen” (PCmagE), etc.

Nevertheless, even such cases present certain similarities between two concepts although in reality these concepts have very little in common. It is important that a subject (property, phenomenon) slightly reminds another subject (property, phenomenon).

As it was mentioned before, one of the essential functions of metaphor is nominative, i.e. transference of nomination of an object, action, status, phenomenon or its property to another object, action, status, phenomenon or its property. Metaphorical nomination occurs according to certain semantic models. As this research comprises only one-word nominative IT metaphors, the focus is allocated to semantic expression of metaphorised terms under nominated word groups.

The researched material principally includes one-word Lithuanian metaphorical terms and their English equivalents nominated with regard to titles of **mode of life, tools or other needs**.

- Titles of **clothing accessories**, e.g.:

(9) Lithuanian *gija* “siūlas, siūlų sruoga” ‘thread, yarn strand’ (DLKŽ),

English *thread* “a long, thin strand of cotton, nylon, or other fibres used in sewing or weaving” (OED),

IT term *thread* “a programming structure or process formed by linking a number of separate elements or subroutines, especially each of the tasks executed concurrently in multithreading” (OED);

(10) Lithuanian *klostė* “drabužiui pagražinti padaryta raukšlė” ‘a wrinkle made for clothing decoration’ (LKŽ),

English *fold* “a form or shape produced by the gentle draping of a loose, full garment or piece of cloth” (OED),

IT term *fold* “an invisible line on a Web page that is at the bottom of the first full page on screen” (PCmagE).

- Titles of **mode of life or other titles related to daily life**, e.g.:

(11) Lithuanian *krepsys* “pintinė; kiekis, telpantis į ją” ‘a basket; amount that fits into it’ (LKŽ),

English *bag* “a flexible container with an opening at the top, used for carrying things” (OED),

IT term *bag* “data structure whose elements are similar type, not proceeded and can be duplicated” (EKŽ);

(12) Lithuanian *rankenėlė* “maž. „daikto ašelė, už kurios galima paimti” ‘a tag of an item by which an item can be held’ (DLKŽ),

English *handle* “the part by which a thing is held, carried, or controlled” (OED),

IT term *handle* “A temporary name or number assigned to a file, font or other object” (PCmagE);

(13) Lithuanian *šiukšlės* “smulkios atmatos, įvairios nukritusios atliekos” ‘small rubbish, various drop waste’ (LKŽ),

English *trash* “waste material; refuse”,

IT term *trash* “to delete a record or file on the computer” (PCmagE);

(14) Lithuanian *gaudyklė* “slastai, spąstai, pinklės” ‘a trap, snare’ (LKŽ),

English *hook* “a piece of metal or other hard material curved or bent back at an angle, for catching hold of or hanging things on” (OED),

IT term *hook* “in programming, instructions that provide breakpoints for future expansion. Hooks may be changed to call some outside routine or function or may be places where additional processing is added” (PCmagE).

- Titles of **working tools**, e.g.:

(15) li Lithuanian *raktas* “įrankis spynai, užraktui atrakinti ar užrakinti” ‘a tool for locking or unlocking’ (LKŽ),

English *key* “a small piece of shaped metal with incisions cut to fit the wards of a particular lock, which is inserted into a lock and turned to open or close it” (OED),

IT term *key* “a numeric code that is used to encrypt text for security purposes” (PCmagE);

(16) Lithuanian *įrankis* “įnagis, prietaisas, instrumentas, padargas” ‘a tool, instrument, device’ (LKŽ),

English *tool* “a device or implement, especially one held in the hand, used to carry out a particular function” (OED),

IT term *tool* “a program used for software development or system maintenance” (PCmagE);

(17) Lithuanian *purkštukas* “purkštuvo antgalis, pro kurį purškiama” ‘a spray nozzle’ (DLKŽ),

English *air brush* “an artist's device for spraying paint by means of compressed air” (OED),

IT term *air brush* “a drawing tool whose drawing line is made of tiny dots similar to a real nozzle” (EKŽ);

(18) Lithuanian *suktukas* “įtaisas kam nors sukuti” ‘a device for something to turn around’ (DLKŽ),

English *spin box* “a rapid turning or whirling motion” (OED),

IT term *spin box* “a form field that enables users to increase or decrease the number value in the text field by a specific increment (often by 1, 5 or 10) via clicking an up or down arrow buttons” (CTDG).

- Titles of **places**, e.g.:

(19) Lithuanian *podėlis* “vieta, patalpa kam padėti, laikyti” ‘a place for keeping, storage’ (LKŽ),

English *cache* “a collection of items of the same type stored in a hidden or inaccessible place” (OED),

IT term *cache* “to store data locally in order to speed up subsequent retrievals” (PCmagE);

(20) Lithuanian *laukas* “žemės plotas, dirva” ‘an area of land, soil’ (DLKŽ),

English *field* “an area of open land, especially one planted with crops or pasture, typically bounded by hedges or fences” (OED),

IT term *field* “a physical structure in a form, file or database that holds data” (PCmagE);

(21) Lithuanian *krūva* “kas į vieną vietą sukrauta” ‘a pile, what is put into a place’ (DLKŽ),

English *heap* “an untidy collection of objects placed haphazardly on top of each other” (OED),

IT term *heap* “in programming, it refers to a common pool of memory that is available to the program” (PCmagE).

- Titles of **other necessities**, e.g.:

(22) Lithuanian *kaukė* “veido uždanga, ppr. vaizduojanti kokį gyvulį ar paukštį” ‘a face veil depicting an animal or a bird’ (DLKŽ),

English *mask* “a covering for all or part of the face, worn as a disguise, or to amuse or frighten others” (OED),

IT term *mask* “a pattern used to transfer a design onto an object” (PCmagE);

(23) Lithuanian *plytelė* “plytos pavidalo gaminys” ‘a brick-shaped product’ (DLKŽ),

English *tile* “a thin rectangular slab of baked clay or other material, used in overlapping rows for covering roofs”(OED),

IT term *tile* “to display objects in rows and columns” (PCmagE).

Titles of various characters are rare in the analysed material:

(24) Lithuanian *nevykėlis* “nevykęs, nenusisekęs žmogus” ‘an unlucky man’ (DLKŽ),

English *lamer* “a stupid, inept, or dull person” (OED),

IT term *lamer* “a technophobic person or neophyte to computers and technology, as viewed by the technically competent who have little empathy for the novice” (PCmagE);

(25) Lithuanian *valdytojas* “kas valdo, valdovas” ‘a person who rules, a ruler’ (DLKŽ),

English *owner* “a person who owns something” (OED),

IT term *owner* “an owner is the individual, computer, or software program that created a file or document” (CTDG);

(26) Lithuanian *svečias* “draugiškas namų lankytojas” ‘a friendly home visitor’ (DLKŽ),

English *guest* “a person who is invited to visit someone's home” (OED),

IT term *guest* “a person who logs into a network or service that does not have a user account” (PCmagE).

Metaphorical concept nomination in computer terminology in Lithuanian and English frequently occurred with regard to titles of **vegetation world**.

(27) Lithuanian *branduolys* “riešuto, slyvos ar kitokio vaisiaus vidurinė dalis, esanti kietame kiaute (kauliuke)” ‘a central part of a nut, plum or other fruit in a hard shell (bone)’ (LKŽ),

English *kernel* “a softer, usually edible part of a nut, seed, or fruit stone contained within its shell” (OED),

IT term *kernel* “the nucleus of an operating system” (PCmagE);

(28) Lithuanian *lapas* “augalo kvėpavimo organas, dažniausiai plonos žalios plokštelės pavidalo stiebo ar šakos išauga” ‘a plant breathing organ usually an outgrowth of a stem or branch in a shape of a thin green plate’ (LKŽ),

English *leaf* “a flattened structure of a higher plant” (OED),

IT term *leaf* “in database management, the last node of a tree” (PCmagE);

(29) Lithuanian *medis* “daugiametis augalas su kietu kamieniu ir šakomis” ‘a perennial plant with a hard stem and branches’ (LKŽ),

English *tree* “a woody perennial plant, typically having a single stem and bearing lateral branches at some distance from the ground” (OED),

IT term *tree* “a data structure containing zero or more nodes that are linked together in a hierarchy” (ETB);

(30) Lithuanian *šaknis* “augalo dalis, kuria jis įsitvirtina žemėje ir maitinasi” ‘a part of a plant which takes roots into the ground and grows’ (LKŽ),

English *root* “the part of a plant which attaches it to the ground” (OED),

IT term *root* “the root is the point from which further subsets are branched in a logical sequence that moves from a broad or general focus to narrower perspectives” (ETB);

(31) Lithuanian *kevalas* “kietas kai kurių vaisių apdaras” ‘a hard shell of some fruit’ (DLKŽ),

English *shell* “the outer case of a nut kernel or seed” (OED),

IT term *shell* “the outer layer of an operating system, otherwise known as the user interface” (PCmagE) and others.

Terms nominated under titles of **animals or related to animals** are rare:

(32) Lithuanian *kirminas* “pailgas minkštakūnis bekaulis gyvis” ‘a long soft body boneless creature’ (LKŽ),

English *worm* “any of a number of creeping or burrowing invertebrate animals with long, slender soft bodies and no limbs” (OED),

IT term *worm* “self-propagating malicious code that can automatically distribute itself from one computer to another through network connections” (ETB);

(33) Lithuanian *pelė* “smulkus graužikų šeimos gyvulėlis” ‘a small rodent’ (LKŽ),

English *mouse* “a small rodent that typically has a pointed snout, relatively large ears and eyes, and a long tail” (OED),

IT term *mouse* “he primary pointing device on a desktop computer” (PCmagE);

(34) Lithuanian. *lizdas* “kiaušinių dėjimo, perėjimo ir vaikų auginimo vieta” ‘a place for egg laying, breeding and chicken growing’ (LKŽ),

English *socket* “a natural or artificial hollow into which something fits or in which something revolves” (OED),

IT term *socket* “a receptacle that receives a plug” (PCmagE) and others.

The presented data indicate that particular items or titles of vegetation or animal world are most often nominated metaphorically in IT terminology in both Lithuanian and English languages. Metaphors of **actions, status or other phenomena** are much less common:

(35) Lithuanian *paveldėjimas* “paveldėti, gauti kaip palikimą” ‘inherit, obtain as inheritance’ (LKŽ),

English *inheritance* “a thing that is inherited” (OED),

IT term *inheritance* “in object technology, the ability of one class of objects to inherit properties from a higher class” (PCmagE);

(36) Lithuanian *patikėjimas* “padavimas kam nors savo reikalo; patikėti” ‘giving someone their own affairs, trusting’ (LKŽ),

English *trust* “firm belief in the reliability, truth, or ability of someone or something” (OED),

IT term *trust* “in network directories, a trust is the passing of the rights of one group to another” (PCmagE);

(37) Lithuanian *silpimas* “pajėgumo, galios sumažėjimas” ‘reduction in power, strength’ (LKŽ),

English *attenuation* “the reduction of the force, effect, or value of something” (OED),

IT term *attenuation* “loss of signal power in a transmission” (PCmagE);

(38) Lithuanian *žingsnis* “žengimo judesys” ‘a stepping motion’ (LKŽ),

English *step*. “an act or movement of putting one leg in front of the other in walking or running” (OED),

IT term *step* “an ISO standard for product modeling. It is designed to provide a vendor-neutral and computer readable definition of a product throughout its life cycle” (PCmagE);

(39) Lithuanian *darna* “darnumas, dermė, harmonija” ‘harmony’ (DLKŽ),

English *consistency* “consistent behaviour” (OED),

IT term *consistency* “consistency of data and their qualities present in the same system, coherence with each other” (EKŽ);

(40) Lithuanian *apgaulė* “veiksmas, elgesys ar žodžiai, kuriais sąmoningai norima apgauti, suklaidinti” ‘actions, behaviour or words which are deliberately used to cheat, misinform’ (DLKŽ),

English *hoax* “a humorous or malicious deception” (OED),

IT term *hoax* “a hoax is a term that describes anything that is not real. For example, many hoax e-mails are distributed to cause false fears” (CTDG);

(41) Lithuanian *lūžis* “didelis pasikeitimas, persilaužimas” ‘a huge change, breakthrough’ (DLKŽ),

angl. *break* “an interruption of continuity or uniformity” (OED),

IT term *break* “to temporarily or permanently stop executing, printing or transmitting” (PCmagE);

(42) Lithuanian *netiesa* “neteisybė, melas” ‘injustice, lie’ (DLKŽ),

English *false* “not according with truth or fact; incorrect” (OED),

IT term *false* “in programming, false is a Boolean value that is used when the result of a logical statement is false” (CTDG).

Generally, metaphorisation of general word meanings in technical terminology takes place as per external similarity of nominated objects, whereas function similarity cases are less frequent (Griniovas, 1993, Stunžinas, 2006). Although it was observed that metaphorisation of general word meanings in the group of the analysed one-word IT terms appeared according to function similarity and it is inherent for metaphorical terms of all groups, e.g. Lithuanian *maišiklis* / English *mixer*, Lithuanian *suktukas* / English *spin box*, *spinner*, Lithuanian *raktas* / English *key*, Lithuanian *lūžis* / English *break*, Lithuanian *valdytojas* / English *owner*, etc. Transference of metaphorical nomination under form similarity is rarer, e.g.

Lithuanian *pelė* / English *mouse*, Lithuanian *medis* / English *tree*, Lithuanian *rankenėlė* / English. *handle*, etc.

Surveying metaphorised computer terms it became clear that special concepts are nominated according to similar, aforementioned areas in both Lithuanian and English languages. It proves the existence of universal models of metaphorical nomination. Only few mismatching cases of metaphorical nomination were discovered, e.g.:

(43) Lithuanian *slapukas* “kas slapstosi” ‘the one who hides’ (DLKŽ),

English *cookie* “a sweet biscuit” (OED),

IT term *cookie* “a small text file (up to 4KB) created by a website that is stored in the user's computer either temporarily for that session only or permanently on the hard disk (persistent cookie)” (PCmagE);

(44) Lithuanian *įsilaužėlis* “įsibrovėlis, kas įsibrovęs, įsiveržęs” ‘a burglar, trespasser’ (DLKŽ),

English *cracker* “a light crisp made of rice or tapioca flour” (OED),

IT term *cracker* “a person who breaks into a computer system without authorization, whose purpose is to do damage” (PCmagE);

(45) Lithuanian *aselė* “indo auselė paimti” ‘a tag of a dish to hold’ (LKŽ),

English *tab* “a small flap or strip of material attached to or projecting from something, used to hold, fasten, or manipulate it, or for identification and information” (OED),

IT term *tab* “a visual identifier that appears in a row on screen and serves as a menu. Clicking the tab opens that dialog or page” (PCmagE) and some others.

On the basis of the presented data it is possible to claim that the majority of simple Lithuanian computer terms of metaphorical origin are semantic loan-translations although externally they are made by means of their own language. These loan-translations occurred under the example of other languages, e.g. the English language, as it is common knowledge that terminology of Informatics was formed on the basis of the English language. Thus, their metaphorical terminological meaning is borrowed. Moreover, it was noticed that metaphorical terms coincide in several languages, e.g.:

(46) Lithuanian *krepsys* – English *bag*, French *sac*, Russian *корзина*;

(47) liet. *raktas* – English *key*, pranc. *clé*, German *Schlüssel*, Russian *ключ*;

(48) Lithuanian *žingsnis* – English *step*, Russian *шаг*;

(49) Lithuanian *lapas* – English *leaf*, German *Blatt*, Russian *лист*;

- (50) Lithuanian **medis** – English *tree*, French *arbre*, German *Baum*, Russian *дерево*;
 (51) Lithuanian **šaknis** – English *root*, German *Wurzel*, Russian *корень*;
 (52) Lithuanian **kirminas** – English *worm*, French *ver*;
 (53) Lithuanian **pelė** – English *mouse*, French *souris*, Russian *мышь*;
 (54) Lithuanian **kaukė** – English *mask*, French *masque*, German *Maske*, Russian *маска*;
 (55) Lithuanian **svečias** – English *guest*, French *invité*;
 (56) Lithuanian **laukas** – English *field*, French *champ*, Russian *поле* ir kt.

Hence, the rendered examples enable to declare some insights that metaphorisation of IT terminology in accordance with the example of the English language took place not only in Lithuanian terminology but also in terminology of other languages. On the other hand, in order to clarify under the example of which language a specific metaphoric term is created, a diachronic analysis of each term is essential which is not the aim of this research.

Conclusions

Metaphorical terms belonging to the group of linguistic metaphors are distinguished by objectivity, lexical and contextual independence, systematicity, integrity and anonymity. While metaphorising, one object is nominated by the title of the other object or the property or function characteristic to one object is transferred to another object. Thus, one word or another is selected not by accident but with regard to a certain similarity of phenomena or concepts. It is noted that external similarity is sufficient for such term transference, i.e. it is important that an object (property, phenomenon) would remind another object (property, phenomenon).

Analysing Lithuanian one-word metaphorical computer terms and their English equivalents, it was determined that in most cases terms maintained their metaphorical meaning in both languages. Only few cases were observed when metaphorical nomination is only distinctive to a Lithuanian term.

Having analysed various ways of metaphorical transference it is obvious that one of the most universal methods is figurative nomination of concepts on the basis of titles of flora world and mode of life. It was observed that there is a tendency to nominate concepts meaning particular objects in both English and Lithuanian IT terminology, whereas analogies of abstract objects are less common. In the group of one-word terms, metaphorical title transference prevails according to function similarity whereas metaphorisation under form similarity is less frequent.

Special concepts are nominated by similar areas in both Lithuanian and English languages. Only few mismatching cases of metaphorical nomination prove the

existence of universal models of metaphorical nomination which is basically determined by regularities of universal thinking and similar experience.

Conformity of metaphorical terms of Lithuanian and other languages enables to state that the majority of Lithuanian metaphorical computer terms are loan-translations (most often from the English language). Thus, metaphorical meanings of most of them are borrowed. Nevertheless, the majority of them are sufficiently motivated in the Lithuanian language as their terminological metaphorical meaning can be clarified by the former non-terminological meaning.

In Lithuanian IT terminology, unlike in English, the method of metaphorical concept nomination is not an efficient method of term creation as a majority of terms are semantic loan-words created under the example of the English language. Original Lithuanian terms constitute only several per cent of all one-word metaphorical IT terms.

Comparative studies of several languages disclose conceptualisation of certain peculiarities of metaphor realisation cases in different languages, which is inherent to different cultures. Inter-language term metaphorisation researches presented beneficial insights about models of metaphorical nomination, revealed both common tendencies of metaphorisation and distinctive ways of conceptual metaphor expression in IT terminology.

Sources

- (CTDG) Computer terms, dictionary, and glossary, <http://www.computerhope.com/jargon.htm>.
- (DLKŽ) *Dabartinės lietuvių kalbos žodynas* ('The Dictionary of Contemporary Lithuanian'). 2011. Managing editor Keinys, S and etc. Vilnius: Lietuvių kalbos institutas, <http://dz.lki.lt>.
- (EKŽ) Dagienė, V., Grigas, G., Jevsikova, T. *Enciklopedinis kompiuterijos žodynas* ('Encyclopedic Dictionary of Computing'). 2012. Vilnius: TEV, <http://ims.mii.lt/EK%C5%BD/>.
- (ETB) *EuroTermBank*, <http://www.eurotermbank.com/default.aspx>.
- (LKŽ) *Lietuvių kalbos žodynas* ('Lithuanian dictionary'). 2008. Managing editor Naktinienė, G. and etc. Vilnius: Lietuvių kalbos institutas, www.lkz.lt.
- (OED) *Oxford English Dictionary*, <http://www.oed.com/>.
- (PCmagE) *Encyclopedia. The Computer Language Company Inc*, <http://www.pcmag.com/encyclopedia>.

References

- Aubusson, P. J. A., Harrison, G., & Ritchie, S. M. (2006). *Metaphor and analogy in science education*. Springer, http://www.academia.edu/4469332/6909399_Metaphor_and_Analogy_in_Science_Education.

- Andrade de, N. G. (2010). Technology and Metaphors: from Cyberspace to Ambient Intelligence. *Observatio* (OBS), 4, 121–146, DOI: <http://dx.doi.org/10.15847/obsOBS412010279>.
- Baltrušaitė, R. (1998). Metaforiniai terminai. *Terminologija*, 5, 36–47.
- Black, M. (1955). Metaphor. *Proceedings of the Aristotelian Society*, N.S., 273–294.
- Boyd, R. (1996). Metaphor and theory change: What is ‘metaphor’ a metaphor for? *Metaphor and Thought Cambridge* (pp. 481–532). Cambridge University Press.
- Bradie, M. (1999). Science and metaphor. *Biology and Philosophy*, 14, 159–166. Kulver Academic Publishers.
- Charteris-Black, J. (2005). Politicians and Rhetoric. *The Persuasive Power of Metaphor*, 28–51. Palgrave MacMillan.
- D’Hanis, I. (2002). The Use of Metaphors in Scientific Development. *A Logical Approach. Logical and Computational Aspects of Model – Based Reasoning*, 21–35. Kulver Academic Publishers.
- English, K. (1998). Understanding science: when metaphors become terms. *Théorie et pratique des discours spécialisés*, 19(22), 151–163, <https://journals.openedition.org/asp/2800>.
- Forceville, Ch. (2002). *Pictorial Metaphor in Advertising*. Taylor & Francis eLibrary.
- Knudsen, S. (2003). Scientific metaphors going public. *Journal of Pragmatics* 35 (8), 1247–1263, DOI: [https://doi.org/10.1016/S0378-2166\(02\)00187-X](https://doi.org/10.1016/S0378-2166(02)00187-X).
- Kuhn, T. S. (1993). Metaphor in Science. *Metaphor and Thought*, 533–542. Cambridge: Cambridge UP.
- Lakoff, G., Johnson M. (1980). *Metaphors we live by*. London: The university of Chicago press.
- Marcinkevičienė, R. (1994). Metafora nemetafora. *Naujas židinys*, 4, 76–81.
- Marcinkevičienė, R. (1999). Atminties labirintuose: Kognityvinės ir tekstynų lingvistikos sąveika. *Darbai ir dienos*, 19, 109–124.
- Marcinkevičienė, R. (2006). Konceptualioji metafora vertime. *Darbai ir dienos*, 45, 109–118.
- Marina, V. (2006). The analysis of English metaphorical terms and their Lithuanian and Russian equivalents from the perspective of linguistic relativity. *Tiltai*, 2, 98–108.
- Papaurėlytė-Klovienė, S. 2005. Probleminiai konceptualiosios metaforos EMOCINĖ BŪSENA ir ASMUO atvejai. *Žmogus ir žodis*, 1, 43 – 47.
- Pielenz, M. (1993). *Argumentation und Metapher*. Tübingen.
- Stunžinas, R. (2006). Metaforiniai statybos terminai. *Terminologija*, 13, 62–75.
- Sweetser, E. (1990). *From etymology to pragmatics: Metaphorical and cultural aspects of semantic structure*. Cambridge: Cambridge University Press, DOI: <https://doi.org/10.1017/CBO9780511620904>.

- Šeškauskienė, I. (2010). Who discusses: the paper or the author of the paper? Inanimate subject + active verb in Lithuanian linguistic discourse as compared to English. *Respectus Philologicus*, 18(23), 83–99.
- Šeškauskienė, I. (2011). The language of research: argument metaphors in English and Lithuanian. *Vertimo studijos*, 4, 46–60.
- Šeškauskienė, I. (2012). Metaforų tyrimo klausimu, arba kaip nustatyti metaforas. *Darbai ir dienos*, 58, 65–79.
- Tretjakova, J. (2013). Metaphor in Terminology: Visualization as a Way to Term Perception. *World Academy of Science, Engineering and Technology International Journal of Cognitive and Language Sciences*, 7(4), 891–894, <https://waset.org/publications/3910/metaphor-in-terminology-visualization-as-a-way-to-term-perception>.
- Valiulienė, E. (2015). Temperature metaphors in lithuanian and english: contrastive analysis. *Verbum*, 6, 207–219, DOI: <https://doi.org/10.15388/Verb.2015.6.8819>.
- Vladarskienė, R. (2012). Metaforiniai ekonomikos terminai. *Terminologija*, 19, 83–92.
- Zaikauskas, E. (2014). Terminų vertimo būdai Europos Sąjungos teisės aktų vertimuose į lietuvių kalbą. *Terminologija*, 21, 71–89.
- Župerka, K. (2000). Kalbotyros terminai publicistikoje. *Darbai ir dienos*, 24, 175–182.
- Волоснова, Ю.А. (2003). Особенности перевода метафорических терминов в сфере информационных технологий. *Лесной вестник*, 4, 39–45.
- Гринев, С. В. (1993). *Введение в терминоведение*. Московский Лицей.

Contact

Prof. Saulutė Juzelėnienė
 Faculty of Social Sciences, Humanities and Arts
 Mickevičiaus g. 37-1309, Kaunas, LT 44244
 Lithuania
saulute.juzeleniene@ktu.lt



DOI: 10.2478/jolace-2019-0007

The Importance of Intercultural Communicative Competences for Tourism Labour Market: Students' Views and their Self-Assessment

Zuzana SándorováConstantine the Philosopher University, Slovakia
zsandorova@ukf.sk

Abstract

The present paper is founded on two pillars. Firstly, it is one of the current trends in education worldwide, i.e. to connect theory and practice. Secondly, it is the need to be interculturally competent speakers of a foreign language in today's globalized world of massive migration flows and signs of increasing ethnocentrism. Based upon these two requirements, the ability to communicate in a FL effectively and interculturally appropriately in the tourism industry is a must, since being employed in whichever of its sectors means encountering other cultures on a daily basis. Therefore, the aim of the present study was to find out undergraduate tourism students' opinion on the importance of intercultural communicative competences for their future profession as well as their self-assessment in the given field. The findings of the research, which are to be compared to employers' needs, revealed that there is considerable difference between the respondents' views on the significance of the investigated issues and their self-esteem.

Key words: intercultural communicative competences, competency development, tertiary education, undergraduate tourism students, questionnaire survey

Introduction

As stated in the Strategic framework – Education & Training 2020 (European Commission, 2009), “in our increasingly globalised and knowledge-based economy, Europe is in need of a well-skilled workforce to compete in terms of productivity, quality, and innovation”. However, growing discrepancies can be detected between the demand of the labour market and the skills people acquire, what leads to unemployment. Therefore, “effective communication between the labour market and the education and training sector is vital” (ibid.).

The present paper is part of a research project whose aim is to find out to what extent the accredited 8.01.01 Tourism study programme develops students' competencies with regard to the needs of their future profession. In addition, a further objective of the investigation is to make recommendations to optimize

the content of the bachelor's degree study programme 8.01.01 Tourism in correspondence with employers' needs. The data are collected through a three-phase questionnaire survey amongst the students of the *8.01.01 Tourism* Bachelor's degree study programme, studying at Constantin the Philosopher University in Nitra in Slovakia, both before and after having completed their three-month compulsory traineeship. In addition, the results are also to be compared with the findings of the questionnaire survey carried out among the entrepreneurs of the tourism sector in Slovakia.

The *8.01.01 Tourism* study programme at Constantine the Philosopher University in Nitra, Slovakia is offered by the Department of Tourism, at the Faculty of Central European Studies. The main objective of this three-year bachelor's study programme is to provide preparation of competent experts in tourism, especially in the context of the multicultural and multinational regions of Central Europe. The study connects theoretical knowledge with practical training in the business sphere, mainly in the tourism sector, which enables students to use the acquired knowledge directly in practice. With regard to the mentioned focus on the multicultural and multinational character of the Central-European regions, special emphasis is put on language education, since in addition to world languages, such as English or German, undergraduates also have to learn one of the languages of the regions in question, i.e. Hungarian, Polish, or Czech.

Although the research project is focused on tourism students' overall competences, (from problem-solving and team-leading through managerial and interpersonal skills to revenue and yield management or controlling quality), the present study only deals with the aspects of intercultural communicative competences (ICC), as follows:

- a) the ability to use a world language effectively in written communication with regard to the sociocultural background of the communicative situation;
- b) the ability to use a world language effectively in written communication with regard to the sociocultural background of the communicative situation;
- c) intercultural competence.

In order to develop the skills in question, undergraduates of the *8.01.01 Tourism* study programme at Constantin the Philosopher University in Nitra have been offered four courses throughout their three-year studies. English/German language 1 in the first and English/German language 2 in the second semester is provided in form of ninety-minute blocks once a week, during the twelve weeks of the semester. The syllabi are concerned with basic tourism terminology and relevant issues in the field. Similarly, students are offered a ninety-minute course of Business English/German 1 in the third semester once a week. The number of

lessons is increased only in the fourth semester, since Business English/German 2 is provided once a week as a 180-minute block. Both courses of Business English/German deal with business and economy-related issues in a tourism-industry context.

As to the development of intercultural competences, undergraduates of the *8.01.01 Tourism* Bachelor's study programme are not offered any courses on intercultural communication. Hence, students can foster their intercultural skills only within the mentioned language lessons or other vocational subjects, what to a great extent depends on teachers' willingness as well as on their competencies in the given field. This fact raises the question whether the structure of the offered courses and the number of the lessons per week is appropriate and satisfactory with regard to the objective of the study programme, i.e. to provide well-prepared, competent experts for the tourism labour market.

Therefore, the aim of the present study was to investigate students' opinions on the relevance of the selected issues in terms of their future employment in the tourism industry, as well as their self-assessment in the field in question. The paper is divided into four main parts. The literature review, which is the theoretical platform of the inquiry, deals with the concept of intercultural communication and ICC, i.e. the key issues of the study. It is followed by the research methodology, together with the research objectives and questions; in addition, the last parts contain the findings of the investigation and the conclusions.

Literature review

Understanding intercultural communication and its significance in today's globalized world

Although the list of various definitions for both culture and communication is endless, there is an agreement on the conceptualization of intercultural communication (Hidasi, 2004). Gudykunst (2002, p. 183) defines it simply as "communication between people from different cultures". Similarly, according to Hidasi (ibid.) it is an interaction between people belonging to different cultural communities.

According to Byram (1991, p. 22) intercultural communication usually takes place either: "*between people of different languages and countries where one is a native speaker of the language used*"; or "*between people of different languages and countries where the language used is lingua franca*"; or "*between people of the same country, but different native languages, one of whom is a native speaker of the language used*".

In fact, „the phenomenon of intercultural communication is as old as human society” (Damen, 1987, p. 23). Indeed, the first human beings can be considered the first intercultural communicators when meeting other groups of their kind during their wandering from cave to cave. In addition, the Bible is full of events describing interaction between different nations and intercultural communication played a crucial role during the Age of Discovery (Hidasi, *ibid.*).

In today’s globalized world, the fact, that cultural differences can be detected in every area of human life, draws attention to the necessity of intercultural communication, and to the benefits that can be reaped from intercultural communication. Liu et al. (2011, also Hidasi, *ibid.*) mention four reasons why intercultural communication is important. First of all, intercultural communication is needed in order to come to terms with the increasing diversity of the population, i.e., the multiculturalism that a lot of countries face today. However, multiculturalism can also be understood as an attitude, referring to “a society’s tolerance towards diversity and the acceptance of equal societal participation” (Kramsch, 1998, p. 20-23). In addition, in order to foster the acceptance of cultural differences, societies have to address the challenge of promoting intercultural understanding, i.e., making people aware that cultural diversities enrich their lives. Furthermore, intercultural communication can be enhanced through international business cooperation, and vice versa: international business exchanges can be promoted by a good understanding of cultural differences. Last but not least, intercultural communication is vital for facilitating cross-cultural adaptation, especially in terms of migration, but also in case of societies encompassing culturally different communities. Anxiety and uncertainty threaten social cohesion; however, they can be reduced by developing intercultural knowledge and skills.

Famous intercultural scholars, including William B. Gudykunst, Edward T. Hall, Geert Hofstede, Florence R. Kluckhohn, Fred Strodbeck or Fons Trompenaars emphasize that is almost impossible to become interculturally competent without understanding in what dimensions cultures can differ from each other, since it influences the way various cultures communicate, both verbally and nonverbally (Hidasi, *ibid.*, Reynolds and Valentine, 2004, Róka and Hochel, 2009). The next part of the paper, therefore, introduces two of the most influential models in intercultural communication studies.

Hofstede (2015) identifies five dimensions in which cultures can be differentiated (see Figure 1). First of all, cultures can be distinguished according to the “individualism-collectivism” dichotomy. In individualistic societies the stress is put on individuals’ goals and personal achievement; whereas in collectivistic cultures individuals are expected to subordinate their personal

goals to the norms and values of the group. In addition, in the former people are independent from other individuals of the community, whilst in the latter people see themselves as interdependent with the other members. Furthermore, cultures can be compared along the continuum of masculinity versus femininity. In masculine cultures, emphasizing power, competition and material success, the roles played by women and men are strictly distinguished; in cultures considered as feminine, stressing the prosocial thinking and interpersonal connections, however, these roles are often exchanged. According to the power distribution in a particular culture, societies with a larger power distance can be described by inequalities between people of different status reflected mainly in the obedient and respectful attitude of the less powerful toward the more powerful ones. On the other hand, cultures with a smaller power distance stress the equality and interdependence between people of different status. The dimension of uncertainty avoidance refers to the degree to which particular societies can cope with uncertainty. Logically, cultures with high uncertainty avoidance strive for information and certainty, whereas in lower uncertainty avoidance societies, people seem to be more comfortable with risk-taking and ambiguity. Finally, cultures can be classified along the continuum of short-term versus long-term orientation; whilst the former is usually associated with savings, quality of products or perseverance, the latter refers to quick results and less saving. It must also be mentioned that in terms of time orientation, Hall (1983, in Gudykunst and Lee, 2002; Liu, 2011; Malota & Ariel, 2013; Reynolds & Valentine, *ibid.*; Róka & Hochel, *ibid.*) also differentiates cultures as polychronic and monochronic. Time in the former is viewed as more circular and relaxed and performing several activities simultaneously is commonplace. However, in the latter people consider time to be linear and prefer to do one thing at a time.

Kluchhohn and Strodbeck's value orientation model (1961, in Hidasi, *ibid.*, Liu, *ibid.*, Malota and Ariel, *ibid.*, Róka and Hochel, *ibid.*) identifies five universal problems that all human cultures have to cope with, and value orientations refer to the means used by different cultures to address these problems. Firstly, human nature orientation deals with the fundamental character of human nature, i.e., whether people are primarily seen as good, bad or a mixture of these two. Apparently, this issue is profoundly linked to the dominant religion in a particular society, for instance, in Buddhism the goodness of the person is emphasized, while in Judaeo-Christian tradition humans can be both evil and good. This perception can influence, for example, how group leaders treat their staff, (e.g. whether they think they are generally lazy or hard-working). Secondly, person versus nature orientation refers to the relationships of people to nature. For example, highly industrialized societies are founded on mastery over nature,

whereas in developing countries human beings are considered to be part of nature and thus expected to live in harmony with all its elements. In addition, similarly to Hall's view, cultures can differ significantly according to their perception of time, i.e., time orientation. For example, the life of people in Western countries, especially the USA, Germany and the Switzerland, is organized around time and on time; hence, punctuality is one of the most highly valued character traits. In other cultures, e.g., in certain countries of Africa, time does not play a key role in people's lives, and there are communities which do not have any verb tenses because of their lack of a sense of time. Furthermore, cultures can also be distinguished according to their activity orientation, which addresses the problem of doing or being. It means that in Western societies a high value is placed on human work, and in certain Asian cultures, due to the influence of Buddhist philosophy praying is regarded as more important than working. Finally, relational orientation, corresponding to Hofstede's idea of collectivism-individualism, refers to a person's relationship to other members of the society. Thus, in collectivistic cultures individuals subordinate themselves to the needs of their community (family); whereas, in individualistic societies personal achievement and success are superior to human relationships.

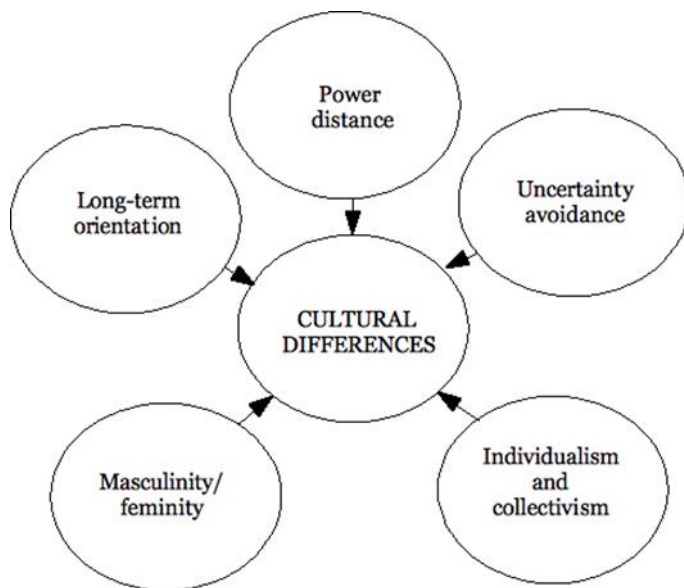


Figure 1: Hofstede's cultural dimensions (Dudovskiy, 2014)

Developing intercultural skills through FL education

As it has already been verbalised, according to numerous intercultural scholars “the key to appreciating cultural differences is acquiring intercultural knowledge and developing intercultural skills” (Kramsch, 1998, p. 26). Or as Liu et al. (2011) put it “intercultural knowledge and intercultural communication skills do not come naturally; they have to be acquired through conscious learning”. Undoubtedly, FL education can enhance acquiring these competences to a great extent by systematically integrating of intercultural aspects in teaching linguistic issues, since culture and language are mutually interrelated (Risager, 2006). *“The perspective of culture as a dynamic, vital and emergent process located in the discursive spaces between individuals links it inextricably to language. That is to say, language is at the same time a repository of culture and a tool by which culture is created”* (Hall, 2002, p. 19).

The current perception of language and culture as inextricable phenomena has its origins in the theory of Benjamin Whorf and Edward Sapir, the fathers of linguistic relativism. The Sapir-Whorf hypothesis suggests that the structural elements of specific languages used by members of particular cultural groups reflect the worldview of these groups (1940, in Hall, *ibid.*; Risager, *ibid.*; Róka & Hochel, *ibid.*). In correspondence with this theory, another linguistic anthropologist, Dell Hymes (1972, in Hall, *ibid.*; Malota & Ariel, *ibid.*; Róka & Hochel, *ibid.*), opposing Chomsky’s idea of language governed by a fixed and context-free set of principles, understood language as a context-dependant social activity. His approach became known by the concept of ethnography of speaking. Last but not least, the context-embedded perception of language as a social action also draws on the work of Michael Halliday, who considered “the essential role of the theory of language to explain the social foundations of the language system” (in Hall, *ibid.*, p. 25-26; Malota & Ariel, *ibid.*; Róka & Hochel, *ibid.*).

The reflection of culture in language and the impact of language on culture can also be illustrated by Hall’s high-context and low-context theory (1996, in Delgadová, 2010; Gudykunst & Lee, 2002; Hidasi, *ibid.*; Reynolds & Valentine, *ibid.*; Róka & Hochel, *ibid.*). The communication patterns and preferences in the former have a rather implicit character, relying on the context of the information and are hidden in the physical setting or in beliefs, values, and standards. In low-context cultures, however, the meaning is explicit and literal due to the elaborated system of codes for developing and interpreting messages.

The intertwined connection between culture and language is also reflected in Byram’s model of ICC (1997, p. 73), consisting of four dimensions: linguistic competence, sociolinguistic competence, discourse competence and intercultural competence. According to the CEFR (2001) linguistic competence includes

lexical, grammatical, semantic, phonological, orthographic and orthoepic competence, while sociolinguistic competence involves “linguistic markers of social relations, politeness conventions, expressions of folk-wisdom, register differences and dialect and accent” (ibid., p. 118). Pragmatic competence refers to the ability to use the language appropriately for particular purposes with regard to the sociocultural context and can further be divided into discourse, functional and design competence. Intercultural competence, according to Byram (1997, p. 73), comprises the following five factors: attitudes (*savoir être*), knowledge (*savoirs*), skills of interpreting and relating (*savoir comprendre*) and skills of discovery and interaction (*savoir apprendre/faire*), as well as critical cultural awareness (*savoir s’engager*).

In terms of the development of ICC, Damen (1987, p. 5) emphasises that FL classrooms create a specialized setting for fostering the given skill; and, for some FL learners it is the only place where the target culture can be experienced. Similarly, Byram (1991, p. 113) outlines that “the inclusion in intercultural communicative competence of critical cultural awareness as an educational aim of FL teaching is crucial”; this standpoint being reiterated also by Alptekin and Alptekin (1990, p. 21) in that “a language and its culture are two inextricable related entities, and as such should be taught together”. Therefore, this requirement should also be taken into consideration by study programmes of tertiary education, especially those which prepare their undergraduates for constant encountering with other cultures. Undoubtedly, tourism is one such sectors of economy and, thus, special emphasis should be put on the development of intercultural communicative skills. This, however, must be reflected not only in the character of FL education, but also in the structure of the study programme, course syllabi and number of the lessons that foster the skills in question. Hence, in order to optimize the content of the 8.01.01 *Tourism* Bachelor’s degree study programme, the following part of the study brings partial results of the research on the competency development of tourism undergraduates in the given field.

Research methodology

Research objectives and questions

The main research aim was to learn about undergraduate tourism students’ opinion on the importance of ICC for their future profession as well as about their self-esteem in the given field.

Based on the main goal **further research objectives** were also determined, as follows:

1. To find out how important the ICC are according to undergraduate tourism students' views with regard to their future employment in tourism.

2. To learn about undergraduate tourism students' self-assessment in terms of their ICC.

Drawing on the research objectives, the following **research questions** were formulated:

1. What percentage of the respondents considers the following items to be very important and always necessary or highly important and often necessary: a.) the ability to use a world language (WL) effectively in spoken communication, b.) the ability to use a WL effectively in written communication, c.) intercultural competence?

2. What percentage of the respondents believes to be very well or completely prepared for the tourism labour market in terms of the following items: a.) the ability to use a WL effectively in spoken communication, b.) the ability to use a WL effectively in written communication, c.) intercultural competence?

The research method

With regard to the main aim, i.e. to reveal students' opinions on the investigated issues the quantitative method of questionnaire was applied.

The sample

The sample consisted of 104 undergraduates of the *8.01.01 Tourism Bachelor's study programme*, studying at the Department of Tourism, Faculty of Central European Studies, Constantine the Philosopher University in Nitra, Slovakia.

The research instrument

The questionnaire with 12 questions focused on the undergraduates' overall competences, (including their work experience and extracurricular activities). However, the present study only investigated two out of the twelve questions, as follows:

Question number 1: In your opinion to what extent are the following skills and competences important with regard to your future employment in the tourism sector? Please, indicate on a scale from 1 to 5 (1 – unimportant, completely unnecessary, 2 – important to a small extent, rather unnecessary, 3 – important to an average extent, rather necessary, 4 – highly important and often necessary, necessary, 5 – very important and always necessary).

Question number 2: Self-assessment – What do you think how well you are prepared to use the given competences in your future profession? Please, indicate on a scale from 1 to 5 (1 – I am not prepared at all; 2 – I am prepared only to a very small extent; 3 – I am only partially prepared; 4 – I am well prepared; 5 – I am completely prepared).

In addition, as already aforementioned, within both questions only three out of the thirty-two items, i.e. competences or skills were investigated, as follows:

Item number 5: Intercultural competence (openness towards other cultures, respecting different cultures, the ability to overcome stereotyped relationships, preserving one's own cultural identity, the capacity to fulfil the role of cultural intermediary between one's own culture and the foreign culture and to deal effectively with intercultural misunderstanding and conflict situations);

Item number 7: Written communication in a WL (the ability to use a WL effectively in written communication with regard to the sociocultural background of the communicative situation, e.g. to meet the requirements of business correspondence when writing letters, compiling reports and documents, etc.);

Item number 9: Spoken communication in a WL (the ability to use a WL effectively in spoken communication with regard to the sociocultural background of the communicative situation, mainly in order to communicate politely, clearly and fluently with customers and business partners);

The items were developed based on the CEFR (2001) and Byram's model of ICC (1997); however, for the sake of simplicity and clearness, three components, i.e. linguistic, sociolinguistic and pragmatic competences were included in Items No 7 and No 9, while intercultural competence was formulated separately as Item No 5.

Results and discussion

As it can be seen in Figure No 2, according to the students' views, the ability to use a WL effectively in spoken communication is the most important one of all the three competences, for it is considered by 57, 69 % of the respondents as very important and always necessary and by 31, 73 % as highly important and often necessary, reaching together 89, 42 % agreement on the importance of this skill. Furthermore, 7, 69 % of the students thought that it was important to an average extent and rather necessary; and, only according to 1,92 % and 0,92 % of the students it was important to a small extent, rather unnecessary or unimportant and completely unnecessary.

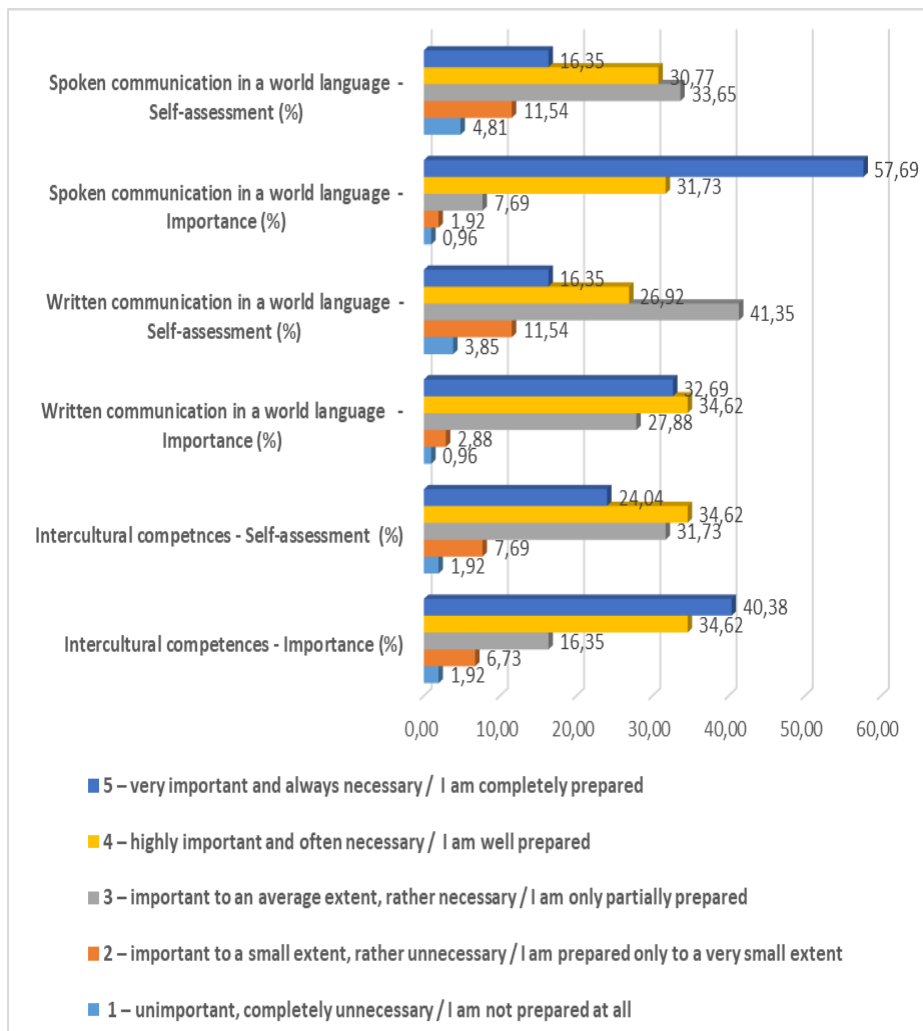


Figure 2: Undergraduate tourism students' opinion on the importance of ICC and their self-assessment

On the other hand, only 16, 35 % of the respondents thought that they were completely prepared and 33, 77 % considered to be well prepared to speak a WL effectively in their future jobs, what is 50, 12 % together. Moreover, 33, 65 % claimed that they were only partially prepared; in addition, 11, 54 % said that

they were prepared only to a very small extent and 4, 81 % indicated that they were not prepared at all.

As far as the ability to use a WL effectively in written communication is concerned, it seems that it is considered the least important out of the three investigated items, since it was indicated by 32, 69 % of the respondents as very important and always necessary and by 34, 62 % as highly important and often necessary, that is 67, 31 % together. Furthermore, 27, 88 % of the students thought that it was important to an average extent and rather necessary; however, similarly to the ability to speak a WL effectively, only 2, 88 % and 0, 96 % considered this skill to be unimportant, completely unnecessary or important to a small extent, rather unnecessary.

In comparison with the undergraduates' self-assessment, 16,35 % thought that they were completely prepared and 26, 32 % considered to be well prepared to use a WL effectively in written communication in their future job positions, reaching together 42, 67 % agreement on the level of preparedness. In addition, 41, 35 % claimed that they were partially prepared. However, 11, 54 % indicated that they were prepared only to a very small extent and 3, 85 % chose the option of not being prepared at all.

In terms of intercultural competence, it was perceived by 40, 38 % of the respondents as very important and always necessary and by 34, 62 % as highly important and often necessary, which together makes a 75 % agreement on the necessity of this skill. In addition, even though 16, 35 % of the respondents thought that it was important to an average extent and rather necessary, according to 6, 73 % and 1, 92 % of the students, intercultural competences could be regarded as important to a small extent, rather unnecessary or even unimportant and completely unnecessary.

As to the students' self-assessment in the given field, 24, 4 % claimed that they were completely prepared and 34, 62 % indicated that they were well prepared to act interculturally appropriately in different situations in their future tourism positions, reaching together 59,02 % agreement on the level of preparedness. However, 31, 73 % of the respondents considered to be only partially prepared; in addition, 7, 69 % and 1,92 % indicated that they were prepared only to a very small extent or not prepared at all.

Conclusion

In order to draw conclusions, firstly, the findings of the investigation will be summarised though giving answers to the research questions.

1. What percentage of the respondents considers the following items to be very important and always necessary or highly important and often necessary: a.) the ability to use a WL effectively in spoken communication, b.) the ability to use a WL effectively in written communication, c.) intercultural competence?

The examined items were considered to be very important and always necessary or highly important and often necessary by:

- a.) the ability to use a WL effectively in spoken communication: 89,42 %
- b.) the ability to use a WL effectively in written communication: 67,31 %
- c.) intercultural competence: 75 % of the respondents.

2. What percentage of the respondents believes to be very well or completely prepared for the tourism labour market in terms of the following items: a.) the ability to use a WL effectively in spoken communication, b.) the ability to use a WL effectively in written communication, c.) intercultural competence?

47,12 % of the respondents believed that they were very well or completely prepared for the tourism labour market in terms of the ability to use a WL effectively in spoken communication, while with regard to the ability to use a WL effectively in written communication it was 43,27 %. In addition, in relation to intercultural competence 54,66 % of the respondents thought they were very well or completely prepared for their future profession.

In the light of the results, several conclusions can be drawn. Firstly, it is the considerable difference between the importance of the investigated items and respondents' self-assessment, especially in terms of spoken communication (high importance: 89,42 % – low self-esteem: 47,12 %), but also in case of the other two investigated issues (written communication: importance – 67,31 %, self-assessment – 43,27 %; intercultural competence: importance – 75 %, self-assessment – 54,66 %). Here, the question arises as to whether the findings reflect undergraduates' lack of self-confidence or their lack of knowledge. It seems that the answer could only be given after further investigation in the field; and, a holistic view of the situation may be captured through the comparison of the present findings with the employers' responses as well as with the students' opinions after having completed their traineeship. In addition, to shed light on the reasons that lie behind the findings, it might be advisable to test undergraduates' knowledge and competences in the examined fields, i.e. their intercultural and communicative competences. Yet, apparently, the data show that there is a need to support the development of the examined competences

and to increase students' self-confidence in the field. Hence, in order to give them more opportunities to practice the WL both in written and spoken communication, it would be worth considering that the number of FL lessons per semester be increased. In addition, integrating new courses in the *8.01.01 Tourism* study programme, such as *Intercultural communication* would undoubtedly contribute to the development of undergraduates' intercultural skills.

References

- Alptekin, C. & Alptekin, M. (1990). The Question of Culture: EFL Teaching on Non-English-speaking Countries. In Rossner, R. – Bolitho, R. *Currents of Change in English Language Teaching*. Oxford: Oxford University Press (pp. 21- 27).
- Byram, M. (1991). Young people's perception of other cultures: the role of foreign language teaching. In Buttjes, D. & Byram, M. (Eds.), *Mediating Languages and Cultures: Towards an Intercultural Theory of Foreign Language Education* (pp. 103-119). Clevedon: Multilingual Matters.
- Byram, M. (1997). *Teaching and Assessing Intercultural Communicative Competence*. Clevedon: Multilingual Matters.
- Council of Europe. (2001). *A Common European Framework of Reference for Language Learning, Teaching, Assessment* (CEFR). [Electronic version]. Retrieved from <http://www.coe.int/t/dg4/linguistic/Source/Framework_EN.pdf>.
- Damen, L. (1987). *Culture Learning: The Fifth Dimension in the Language Classroom*. Reading: Addison-Wesley Publishing Company.
- Delgadová, E. (2010). Kultúra a komunikácia. Teoretické východiská a vymedzenie pojmov. [Electronic version]. In *Kultúrna pluralita, univerzalizmus, interkultúrna komunikácia, interkultúrne kompetencie*. Bratislava: Ekonóm. Retrieved from: <http://www.academia.edu/2604847/Kult%C3%BAra_a_komunik%C3%A1cia_Teoretick%C3%A9_vymedzenie_pojmov>.
- Dudovskiy, J. (2014). *Hofstede's Cultural Dimensions*. [Electronic version]. Retrieved from: < <http://research-methodology.net/hofstedes-cultural-dimensions-2/>>.
- European Commission. (2009). *Strategic framework – Education & Training 2020*. [Electronic version]. Retrieved from < http://ec.europa.eu/education/policy/strategic-framework_en>.
- Gudykunst, W. B. (2002). Intercultural Communication Theories. In Gudykunst, W. B. & Mody, B. (Eds.), *Handbook of International and Intercultural Communication*. Thousand Oaks: SAGE Publications, 183- 206.

- Gudykunst, W. B. & Lee, C.M. (2002). Cross-Cultural Communication Theories. In Gudykunst, W. B. & Mody, B. (Eds.), *Handbook of International and Intercultural Communication*. Thousand Oaks: SAGE Publications, 25-50.
- Hall, J. K. 2002. *Teaching and Researching Language and Culture*. Harlow: Pearson Education Limited.
- Hidasi, J. (2004). *Interkulturális kommunikáció*. Budapest: Scolar Kiadó.
- Hofstede, G. (2015). *Dimensions of national Cultures*. [Electronic version]. Retrieved from: <<http://www.geerthofstede.com/dimensions-of-national-cultures>>.
- Kramsch, C. (1998). *Language and Culture*. Oxford: Oxford University Press.
- Liu, S. et al. (2011). *Introducing Intercultural Communication. Global Cultures and Contexts*. London: SAGE.
- Malota, E. & Ariel, M. (2013). *Kultúrák találkozása*. Budapest: Alinea Kiadó.
- Reynolds, S. & Valentine, D. (2004). *Guide to cross-cultural communication*. New Jersey: Pearson Education, Inc.
- Risager, K. (2006). *Language and culture: Global Flows and Local Complexity*. Clevedon: Multilingual Matters LTD.
- Róka, J. & Hochel, S. (2009). *Interkulturális és nemzetközi kommunikáció a globalizálódó világban*. Budapest: Budapesti Kommunikációs és Üzleti Főiskola.

Contact

Mgr. Zuzana Sándorová, PhD.
Department of Tourism
Faculty of Central European Studies,
Constantine the Philosopher University in Nitra
Dražovská 4, Nitra 949 74, Slovakia
zsandorova@ukf.sk

Gendered Performance, Fluid Identities and Protest in Tess Onwueme's *Then She Said It*

Rowland Chukwuemeka Amaefula

Alex Ekwueme Federal University, Nigeria
emy4real2004@gmail.com

Abstract

This study examines the social constructions of gender as the encapsulation of reiterated human conducts within varying sites of performance. Contrary to the notion that gender roles are fixed by socio-cultural forces, this paper focuses on the fluidity of human dispositions in differing circumstances. Adopting Judith Butler's theory of gender performativity, the researcher analyses Tess Onwueme's *Then She Said It*. This protest play attests to the variability of gender performance. The characters in the drama, especially the protagonists and antagonists, exhibit considerable alterations in gender performance in different situations. Thus, the study argues that the rigid classification of gender roles along sex lines (on both biological and gendered sexuality) in protest drama in Nigeria is incongruous with the characters' dispositions in the plays. Indeed, characters adopt cross-gendered performances as a strategy of protesting against overbearing conditions.

Key words: drama, protest, gender, sex, performance

Introduction

The beginning of women's accomplishment of heroism through protests is traceable to the renowned amazons of the classical Greek society. It is paradoxical to refer to this source given that the ancient Greek society upheld standards that lionised men and denigrated women. Christina Clark was right when she noted that the "Classical Greek culture was strongly marked by gender segregation. Generally, the public sphere was associated with men, the domestic, with women" (2009, p. 6). Unlike the Classical Greek females, some women in ancient Africa such as Queen Amina – a warrior, authoritative queen mothers, among other outstanding women leaders, "accomplished great feats; displayed exceptional skills and talents; stood up against oppression and injustice; and contributed much to the society" (Salami-Agunloye, 2006, p. 99). However, the advent of colonialism stifled the voice of women and entrenched a gender-oriented control mechanism that perseveres despite decolonization. The event of colonialism informs the (re)constructions of gender roles in protest drama in postcolonial Nigeria.

The protest drama genre in postcolonial Nigeria, according to Asigbo, was a reaction to “the impunity with which the military ruled the country hence writers [... of protest plays] incited the masses to be awake to their rights” (2013, p. 21). This category of drama was written by young dramatists who examine social problems in plays, arguing that the problems of Nigerians and indeed humanity are self-made and “not from the metaphysical realm or from the gods” (Obafemi, n.d., p. 46). Mainly written by such second generation of playwrights as Femi Osofisan, Bode Sowande, Emeka Nwabueze, Esiaba Irobi, Tunde Fatunde, among others, protest drama presents revolt as a panacea to socio-political problems that bedevil Nigerians. Beginning from the 1990s however, protest plays in Nigeria have been dominated with feminist messages, popularising the perspective that women are subordinated to men, and must revolt against the latter to attain gender parity.

John-Pepper Clark, in *The Wives’ Revolt*, foregrounds protest in forestalling oppression against women. In ‘Proclamation’ for example, Okoro, the arrowhead of men’s dictatorship in Erhuwaren community – the setting of the play, announces a sharing formula for money donated to the village by an oil company, and new policies that emasculate women’s income. This declaration reinforces the prevailing thought that men are leaders; women, their passive subjects. Through self-exile therefore, the women of Erhuwaren protest against the decisions of men. The protest culminates in a reversal in gender performance: the hitherto dictatorial men become conciliatory and thus consent to the women’s demands for a repeal of the proclamations. Evidently, without protest, women – whose socially assigned dispositions include passivity, docility and submissiveness – would infinitely be victims of men’s excesses, especially in the promulgation of policies.

In fictionalizing the taxation policy and Aba Women’s riot of 1929 in his play – *The Dragon’s Funeral*, Emeka Nwabueze projects women’s protest in drama as not only a panacea for problems that affect them but also a determinant of gender performance and changing identities (2005). The female characters in the play form a women’s league and embark on a riot, as a means of annulling the new taxation policy imposed on them. Although unprecedented, the women’s resort to a riot proves to be the only power they wield in the intensely sexist Osisioma community – the setting of the play, since men occupy most positions of authority in the land. The women’s protest yields fruits when colonial masters and their black collaborators fail to quell the revolt. Consequently, the famed strength of men – the colonial administrators and their warrant chiefs – is soon weakened in the face of women’s protest, thereby seemingly validating the belief that men’s prowess is dependent on women. This calls into question the rigidity of gender

roles assignment in Nigerian drama, according to normative masculinity and femininity.

Based on the foregoing, this study examines gender roles in Tess Onwueme's *Then She Said It* vis-à-vis the characters' changing conditions. Clearly, the play to be examined here reveals a multiplicity of dispositions for women, culminating in conflicting gender roles. The dramatist foregrounds a multi-focal thrust, indeed, she interrogates an ambivalent sociocultural backdrop that presents women simultaneously as strong and spineless. In a number of post-independence Nigerian plays, women are presented as fearless, brave and bold or docile, submissive and seductive. For example, "The portrait of women as vile creatures in *My Daughter is an Egg* by Stella Oyedepo which sharply negates their image as worthy leaders in *The Rebellion of the Bumpy-Chested* by the same playwright," exemplifies conflicting gender roles (Rowland Amaefula, 2016, p. 2).

Nelly Furman notes that, in a sexist society such as Nigeria, "the trouble with woman is that she is at once an object of desire and an object of exchange, valued on one hand as a person in her own right and, on the other, considered simply as a relational sign between..." (1980, p. 51). The point being made here is that while gender roles for men in Nigerian protest drama are predicated on a culturally-constructed gender imbalance that privileges men and subordinates women, the resulting construct is not fixed, it is fluid and open-ended. Thus, using Onwueme's *Then She Said It* as a model, this essay examines the nexus between protests in Nigerian drama and the shifting gender roles for men and especially women. Textual analyses are based on Judith Butler's Gender Performativity which emphasizes reiterations of role performances by an individual as a pathway to establishing his/her gendered identity.

According to Butler, "the gendered body utilizes semiotic and material signs (words, acts, gestures, and desire) to similarly create what appears to be an interiority", which she calls "the effect of an internal core on the substance" (2013). Butler further posits that

gender is stabilized by the construction of a norm – heterosexuality – against which all other gender constructions are measured and found wanting. This norm may be stabilized, but it is not fixed. It constantly needs to be re-performed since it is constituted by its 'acts', not by some essentiality (2013).

Such repeated performance indicates that gender exists momentarily, in process, instead of being a permanent fixture. In other words, one's gender performance cannot be determined at one time. It is recurrent and dynamic, depending on circumstances. A very quiet and submissive woman, when exploited to the point of provocation, could realize her condition and become 'aggressive',

'bold' and 'ambitious' – attributes normatively ascribed to men, exclusively. This implies that the performance of gender is not only repetitive and fluid, performance can be used to both reinforce as well as contest gender constructs. Hence, Butler likens gender to style: "Gender is a style, rather than a substance, and styles are subject to change – they are fundamentally unstable, in need of *further theatrical performance and public consensus* concerning their importance" (2007; my emphasis). In Butler's gender performativity, public consensus is strengthened through repeated performance of gender roles in the presence of people. Thus, the difference between performance and performativity approximates the distinction between drag and gender. Notably, Butler discussed gender performativity in relation to drag. Drag indicates a mimetic representation of a particular gender category. It is a transient, situational act; a performance. However, performativity suggests "a continual resignification of gender" (Jenkins & Finneman, 2017, p. 159). The point being made here is that gender identity is attained through the consistent reiteration of a specific gender performance. Any shift in gender performance however – possibly propelled by an overwhelming influence of a circumstance – de-institutes the existing identity of the subject.

A Deconstruction of Feminism, Gender and Sex

Scholarly discourses on gender are often linked with feminism. The difference between both concepts lies in the level of their accommodation of both sexes. While gender considers the behavioural patterns associated with the male and the female, feminism, according to Lois Tyson, "seeks to understand the ways in which women are oppressed – socially, economically, politically and psychologically – in order to reduce, if not eliminate their oppression" (2011, p. 139). Feminism is mostly woman-specific while gender is not. Ideally, feminism in Nigeria presupposes that men are privileged over women in societies where patriarchy is prevalent and enshrined within the social fabric of societies, and this stimulates the need for the eradication of all systemic frameworks that inhibit woman from achieving her full potential. One of such inhibitions is ignorance.

This is evident in Ola Rotimi's *Our Husband Has Gone Mad Again* which presents Mama Rashida and Sikira as basically ignorant and, consequently, voiceless and powerless. Satisfied in subservience, they do not comprehend Lejoka-Brown's exploitative missions. With the entry of Liza however, Sikira and Mama Rashida realise the artificial foundation on which Lejoka-Brown builds their union, to fortify his patriarchal domination of them. Indeed, feminism encourages men and women to accomplish their goals, regardless of the traditional prescriptions of masculinity and femininity.

Simone de Beauvoir argues that the notions of masculinity and femininity are social constructs that are designed to enslave woman (1952, p. 122). She states that all the creation myths evolved by men have affirmed female subservience: "Genesis tells us that woman was not created as a being in her own self but as a being for man... she was created to rescue man from loneliness... she was not created of the same dust as man but from man's ribs" (De Beauvoir, 1952, p. 88). Therefore, man's existence is a right woven in independence while woman's is an accident subordinated to man. De Beauvoir's arguments are pivoted on the idea that gender construction is patriarchy-based. Thus, she submits that, "One is not born a woman; one becomes one" (1952, p. 88). In reinforcing this point, Tyson argues that „...women wear pointy shoes with high heels not because they have pointy feet and need help reaching the top shelf of the cupboard, but because patriarchy tells them that such footwear is feminine. And such footwear is considered feminine because, among other things, it makes women less mobile and therefore, in appearance at least, less able to compete [with men]" (2011, p. 143).

Kate Millet likens gender to "a power-structured relationship and arrangement whereby (man) controls (woman)" (2007, p. 123). "Gender", Millet explains, "is a term that has psychological or cultural meaning rather than biological connotations... Gender role is determined by post-natal forces, regardless of the genitalia" (2007, p. 148). Thus, while sex is a biological manifestation, gender is culturally determined. The political implications of the social construction of gender categories become manifest when contemplated against the background of the socialization process. According to Millet, if man is the head of the family and "family is the chief agent of patriarchy," then the child receives his gender prescriptions through socialization, under the strict supervision of man (2007, p. 146). Millet further argues that among the features and conditions that define feminine and masculine genders are temperament, role and status:

Women	Men
Temperament: passive, ignorant, docile, ineffectual and virtuous.	Intelligent, aggressive, force and efficacy.
Sex Role: domestic chores and caring for infants.	Strenuous activities, the rest of human achievements, interest and ambition.
Status: It follows that women will be accorded a low status.	It follows that men would be accorded a high status.

(The table above was culled from page 146 of Kate Millet's article titled, "Sexual Politics.")

The belief that gender roles are assigned according to an individual's sex is critically tenuous. It is widely accepted that sex is constructed on the plank of biological determinism (Christine Delphy, 1993, p. 3; Ann Oakley, 1985, p. 16). However, the conferment of high or low status on a sex regardless of the individual's level of achievements or manifest endowments, is questionable. Gender is a variable feature, not a rigid measurement of high or low status, as neatly laid out in the binary opposites contained in the table above. Oakley implicates gender in every recognized difference – social, psychological or cultural – between man and woman. These differences are observable overtime, and do not compulsorily take the shape of a laid down template that pre-exists an individual. In this regard, she states that, "The constancy of sex must be admitted, but so too must the variability of gender" (Oakley, 1985, p. 16). The variations in gender are therefore dependent on the dynamism of one's behaviour, performance or role.

Writing on gender and roles, Delphy notes that, "The notion of gender developed from that of sex roles, and, rightly or wrongly, the person who is credited with being the mother of this line of thought is Margaret Mead" (1993, p. 1). Delphy further remarks that, although Margaret Mead is only interested in examining "the feminine and masculine temperaments", her research motivated thoughts on sex roles, beginning from the 1940s to the 1960s" (1993, p. 2). The term 'role' is associated with performance. On the rehearsal floor of a theatre production, role technically connotes the acquisition of characterization; an activity. Delphy thus defines "a role as the active aspect of a status" (1993, p. 2). A status is a normative quality that prescribes roles and the concomitant pressure to perform them as a method of maintaining the class or status. Therefore, role performance can do a number of things; from restoring and reinforcing constructed stereotypes and beliefs, to resisting, challenging and negating the conditions of a status. If sex is a normative and constant status, then what is more? Gender is a variable, shaped by role performance.

Butler's position however runs counter to the constancy of sex. She theorises that "The category of 'sex' is, from the start, normative; it is what Foucault has called a 'regulatory ideal'. In this sense, then, 'sex' not only functions as a norm, but is part of a regulatory practice that produces the bodies it governs, that is, whose regulatory force is made clear as a kind of productive power, the power to produce – demarcate, circulate, differentiate – the bodies it controls. Thus, 'sex' is a regulatory ideal whose materialization is compelled, and this materialization takes place (or fails to take place) through certain highly regulated practices" (1993, p. 12).

In other words, sex, in Butler's opinion, is a construct which is forcefully made manifest overtime. Its construction is achieved through reiterated enforcement of

the norms that constitute it. The implication of this view is that, failure to enforce the regulatory law that sustains the construction of sex, the bodies might not comply with these norms by which its manifestation is compelled. Thus, sex is “not simply what one has or a static description of what one is: it will be one of the norms by which ‘one’ becomes viable at all, that which qualifies a body for life within the domain of cultural intelligibility” (Butler, 1993, p. 13).

According to this view, societal norms propel the construction of sex while gender appropriates the social significance of sex. Accordingly, the social institution of the natural supposes the de-institution of the natural by the social. The question then is, if gender is the social-cultural meaning and interpretation assigned to sex, what then is sex when it assumes the social character and significance of gender? If gender comprises the social importance of sex, then sex does not amass any social relevance but is instead displaced by its social value – gender. Thus, “sex is relinquished in the course of that assumption, and gender emerges, not as a term in a continued relationship of opposition to sex, but as the term which absorbs and displaces sex” (Butler, 1993, p. 45). The point being made here is that sex is as much a social construct as gender.

The dynamism and flexibility associated with gender underscores the possibility of variegated masculinities and femininities. There is no iron-cast demarcation between gender roles but an individual's attributes-in-action determine his or her gender performance. According to Sara Mills and Louise Mullany, “Gender has progressed from being conceptualized as something which individuals have, an essential quality acquired through the socialization process, to something that individuals do/actively perform... gender is co-constructed within interactions” (2011, p. 41). In this light, Mills and Mullany's argument contests and contradicts the earlier notion that gender construction is a societal outline that pre-exists individuals; in effect, the patriarchy-driven construction has been supplanted with the view that “participants in conversation bring about their gendered identity, thus seeing gendering as a process of emergence, and one that is not completed” (2011, p. 41). Gender is a process, not a project. Therefore, it is increasingly obsolete to assume that men as a homogenous group unanimously oppress women as a homogenous group; that masculinity imbues men with feelings of superiority, and femininity plagues women with airs of inferiority. For instance, the isolation of characters along sex lines in Julie Okoh's *Edewede* confers their gender performance with overstretched homogeneity (2000). The depiction of men as collective tormentors of women in the play erodes individualised gender performances and renders old women – the supposed brainwashed collaborators of men – displaced.

The strict delineation of characters' gender roles along sex lines disregards the prevalence of some women whose interiority is masculine and some men whose interiority is feminine; gays, lesbians, effeminate persons and other non-conventional forms of sexuality. Newton, qtd. in Butler, 2013 corroborates this stance when she argues that "At its most complex, (drag) is a double inversion that says, 'appearance is not reality...' my 'outside' appearance is feminine, but my essence 'inside' is masculine. At the same time, it symbolizes the opposite inversion; 'my appearance' outside (my body, my gender) is masculine but my essence 'inside' (myself) is feminine" (2013, p. 5).

Indeed, the performance and interactions of such individuals violate the notion of gender as socially prescribed conventions imposed on an individual. Mills and Mullany summarise this view as follows: "Researchers *have moved away from a reliance on binary oppositions and global statements about the behaviour of all men and all women*, to more detailed and mitigated statements *about certain groups of women or men in particular circumstances*, who reaffirm, negotiate with and challenge the parameters of permissible or socially sanctioned behaviour... *Rather than seeing gender as a possession or set of behaviours which is imposed upon the individual by society...many feminists now...view gender as something which is enacted or performed, and thus a potential site of struggle over perceived restriction in roles...* Thus, gender is *not* a given, but rather *a process which one has to constantly perform*" (2011, p. 42; emphasis added).

It is instructive to note that gender performance is the materialization of an individual's body through reiterations of (un)stable gendered behaviour in discourses. For example, in Clark's *Song of a Goat*, Ebiere's initial gender performance coheres with the feminine attributes of a wife (1977). However, the quest to prove her fecundity in the course of the dramatic actions, pushes her into an incestuous relationship with Tonye, the younger brother of her husband, Zifa. Ebiere's rebellion against a conventional family order is instigated by her disadvantaged position in the marriage and the desire to unmask Zifa's duplicity (Clark, 1977). Thus, her rebellion departs from and de-institutes her hitherto gender performance. This shift in gender performance strengthens the view that gender is a "potential site of struggle over perceived restriction in roles" (Mills and Mullany, 2011, p. 42). Indeed, the gender role of an individual is a circumstance-conditioned performance of his/her interiority.

A Historical Survey of Protest in Nigeria Drama

Within Protest Plays, one is confronted with a dual demonstration of rejection; first, at the level of gender identity, and second, with the nature of the drama. Protest Plays have been described as dramatic works that dwell on the varying

layers of disillusionment Africans experience(d) at the hands of native post-Independence leaders (Saint Gbilekaa, 1997, p. vi). According to Alex Asigbo, “a major reason... that shaped the writing of this period was the impunity with which the military ruled the country hence writers [... of protest plays] incited the masses to be awake to their rights” (2013, p. 21). In describing them as “emergent drama”, Olu Obafemi notes that they are written by young dramatists who seek to “break down societal problems in the light of real historical occurrences” (n.d., p. 46). Continuing, Obafemi avers that Protest Plays present the argument that the problems of humanity are self-made and that they are “not from the metaphysical realm or from the gods” (n.d., p. 46).

The socio-political factors that led to protest drama in Nigeria are located in failure of leadership and the then emergent class consciousness which, according to Gbilekaa, resulted from the “...socio-political and economic developments after Nigeria’s civil war and the replacement of cash crops like cocoa, groundnuts, palm oil and beniseed by petroleum, as the major item of export... [This] further widened the gap between the haves and have-nots, thus creating a class-conscious society. This brought a gradual thematic shift from the individual lone ranger to the masses of the society. The gloomy and bleak picture of the future characterized by the plays of Soyinka and Clark, the single history-making individual in the plays of Rotimi gave way to the masses’ hero in the drama of the new generation of playwrights like Femi Osofisan, Kole Omotosho, Bode Sowande, Bode Osayin and many others” (1997, p. vi).

The import of Gbilekaa’s postulation is that the disconnection of the masses from Agriculture – their familiar economic mainstay – pauperized them while the sales of crude oil catapulted a few others to the niche of affluence. Thus, protest drama was stimulated by the combination of the then emerging class consciousness and the crushing effects of inept leadership.

Commenting on the leadership woes in Nigeria’s post-independence period, Chinua Achebe states that “The trouble with Nigeria is simply and squarely a failure of leadership. There is nothing basically wrong with the Nigerian character. There is nothing wrong with the Nigerian land or climate or water or air or anything else. The Nigerian problem is the unwillingness or inability of its leaders to rise to the responsibility, to the challenge of personal example which are the hallmarks of true leadership” (1983, p. 1).

Thus, playwrights of protest plays identify incompetent leadership as the major cause of the country’s woes. Achebe, while citing James Booth, captures the prevailing mentality of politicians such as Awolowo, thus: “I was going to make myself formidable intellectually, morally invulnerable, to make all the money that

is possible for a man with my brains and brawn to make in Nigeria" (Achebe, 1983, p. 14).

Undoubtedly, the mentality above was bound "...to produce aggressive millionaires than selfless leaders of their people" (Achebe, 1983, p. 14). Selfish leadership in the post-independence Nigeria did not only negate all the nationalists' pre-independence pledges but also pauperized the average Nigerian. As a panacea, playwrights of protest plays called for the overthrow of the current crop of leaders, using the theatre platform. Gbilekaa notes that "Besides challenging Aristotle's 'commandments', theatre since the advent of Marx and Engels has taken a definite ideological position in the on-going class struggle. In African theatre today, most Marxist analyses of the society have been employed both in conventional and popular theatre to release the people from the claws of, and even to urge them to revolt against, the decadent social order that oppresses them" (1997, p. i).

The excerpt above resonates the view that protest plays do not seek to endorse Nigeria's indigenous traditions but to address the leadership-induced quagmires of the country.

The adoption of the revolutionary model of playwriting has endured across successive periods. This is discernible in the playwrights' ideological commitment – their constant deployment of the revolutionary feature of theatre to conscientize the exploited populace. The playwright achieves this by creating social awareness and depicting insurgence against oppressive leaders in a manner that would induce imitation in real life circumstances. Thus, according to Obafemi, while the first generation of playwrights in Nigeria "deal with universal verities and metaphysical profundities such as the part-psychic search for the meaning of life and death in Soyinka's *The Road*," the second generation of playwrights such as Femi Osofisan, Bode Sowande, Emeka Nwabueze, Esiaba Irobi and Tunde Fatunde tackle urgent social problems that have immediate practical utility to mankind (*n.d.*, p. 92).

It is noteworthy that beginning from the 1990s, Protest Plays in Nigeria have been dominated with feminist messages, entrenching the view that women are widely oppressed by men, and must revolt against the latter to erode gender-based subjugation.

The Synopsis of Tess Onwueme's *Then She Said It*

Then She Said It by Tess Onwueme is a graphic demonstration of the tussle of the Niger Delta people of Nigeria who live in penury in the midst of abundant natural resources. Set in Hungeria – a metaphor for the Niger Delta region of Nigeria – the play dramatizes the people's resoluteness to overcome the age-long

exploitation of their region by the government at the centre – the federal government. The play begins with a prelude that showcases the suffering of the people – gunshots rattle a supposed peaceful environment as stray bullets disfigure old women, girls and even men. The people lament and decry the issues that bedevil their region: poverty, starvation, inadequate supply of fuel, water and electricity, rape, unemployment, state-sponsored terrorism and genocide, environmental pollution and betrayal. Amidst this lamentation, the people resolve to fight back until their plight draws international recognition. Different characters symbolise each of the issues interrogated in the play: Obida is a serial victim of betrayal and incestuous rape perpetrated by her uncle, Ethiope; Ethiope represents the ruling class in the Niger Delta region that persistently betray their people in order to amass wealth for themselves and gain more power and fame; Atlantic represents the multinational corporations that persistently seek more gains at the expense of the people; Oshun is a typical young lady of the Niger Delta region who resorts to prostitution as a means of survival; while Niger and Benue represent distraught mothers in the Niger Delta region who can neither provide for nor control/influence their children's upbringing and activities.

Onwueme's *Then She Said It* exposes the complicity of Hungerian leaders in the pauperization of the common man: foreign oil company operators such as Atlantic connives with the leaders to steal the country's oil wealth, and rewards the people with a pittance that is, in turn, stolen by greedy local chiefs such as Ethiope. As the exploitation of the Niger Delta people becomes unbearable, they jointly coordinate a mass protest and an attack against their exploiters – oil companies, local leaders and federal government. Pandemonium reigns awhile as the protesters defy law and order. The declaration of a State of Emergency introduces a new leader that freely uses state weapons and firepower on defenseless citizens thereby inflicting more personal pain and collective damage on the protesters than they (the protesters) caused. Having sacked many communities and apprehended a handful of the protesters, the new leader charges them to court. The new leader however is not different from the rulers he replaced. Thus, he compromises Trial Judge that will try the incarcerated protesters in court. By switching places with Trial Judge and Defence Lawyer, Obida and Koko respectively disguise themselves as the legal experts. This singular action of theirs overturns the earlier compromise made by the new leader and Trial Judge. Finally, a "No Guilty" is retuned when the arrested leaders are tried in an international court.

The Historical Contexts of *Then She Said It*

Then She Said It is set in the Niger Delta region of Nigeria in West Africa. In Niger Delta, women are often saddled with such economic responsibilities in the

family as wives, mothers and breadwinners. Emmanuel Osewe Akubor substantiates this point when he states that “Niger Delta women... are the poorest in the world as a result of the oil production, which brought about environmental degradation and poverty and subsequent crisis” (2011, p. 27). Specifically, environmental degradation and exploitation of the ecosystem by the multinational companies in the region account for the worsening economic activities of the inhabitants of the Niger Delta region. This unstable socio-economic condition degrades and relegates the men to the position of constant job seekers and renders women vulnerable to rich and randy male expatriate workers. Indeed, each case of gas flaring, rape, damage of oil pipeline and other forms of hostilities in the region further weakens women’s economic condition and fosters a militant disposition within them. Hence, unlike women in other regions in Nigeria, they actively participate in militant activities and demonstrations, protests and other forms of resistance captured in Tess Onwueme’s *Then She Said It*.

The characters in the play bear the names of the major rivers in the Niger Delta region and beyond. For example, the character called Oji represents the South East wing of the Niger Delta region. Oji River is the name of a major river in Enugu State, South East, Nigeria. Oshun stands for the South West component of Niger Delta; Kainji is named after a dam built across River Niger in the Middle Belt region (North Central); while Benue signifies River Benue, a major river that runs from Cameroun and joins River Niger in Lokoja, Kogi State in Northern Nigeria. The playwright’s adoption of names of the major rivers in different parts of the county is an implicit acknowledgement that the subject matter in *Then She Said It* is a national one. An international dimension to the problem is reflected in the choice of the character called Atlantic. He represents the Multinational Corporations that inflict hardship and poverty on the people of Niger Delta. True to his capitalist nature, Atlantic, in his insatiable quest for more gains, erodes joy from the region and constructs himself as a purveyor of pain and penury in Niger Delta.

Nationally and within the play, the local leadership of the Niger Delta region is compromised. The leaders like Atlantic and Ethiope in whom the people repose communal trust often volunteer themselves as accessories of exploitation of the area. Ethiope, in the play, represents compromised leadership. Apart from raping his niece, he also makes money by selling his female relatives as sex slaves to expatriate workers. Indeed, the Niger Delta region parades compromised leaders who aim at personal goals to the detriment of communal targets. It is against this backdrop that Onwueme, arguably the most prominent female playwright in Nigeria, evokes protest as a panacea for continued exploitation of women; and a core condition for contesting and de-stabilizing the principles and practices of rigid gender roles.

Gendered Performance, Fluid Identities and Protest in Then She Said It

Generally, Onwueme's theatre parodies so-called official responses to cries against the exploitation and oppression of the downtrodden. Although *Missing Face* and *Legacies* border on attempts to trace one's roots, both plays do not erode the fact that Onwueme habitually launches a scathing criticism on mis-governance, tyranny and frivolous leadership without necessarily providing anti-dotes built on solid structures; her solutions are based primarily on the force of superior argument than on socio-culturally grounded interventions and practices. Her main strengths are initiating a debate between the marginalised and their oppressors and in which the former relies on the force of reason to both articulate their plight and to justify their actions. Iniobong Uko corroborates this view when she states that "Onwueme's writings find relevance within the framework of the theatrical practices of Bertolt Brecht" – which encourages the self-determination of a man's fate (2004, p. 189). This theme runs through most of Onwueme's plays. Therefore, if the attack on repressive leadership led by Wazobia, the heroine in *The Reign of Wazobia*, is confrontational, the women's protest in *Then She Said It* climaxes the theme of revolt in her plays.

Onwueme's *Then She Said It* is a graphic replay of the consequences of oil exploration on the flora and fauna of the Niger Delta region. The activities of oil companies result in the depletion of the ecosystem and corrosion of the people's traditional means of livelihood – fishing and farming. Thus, farmers are rendered redundant while educated young people seek employment opportunities in the oil companies, without success. The pathetic state of affairs in Hungeria – a metaphor for Nigeria – is revealed in the dialogue between Obida and Niger:

Niger: Poor child! So you teachers have also joined the tribe of unemployed, eh?

Obida: They've killed everything with their oil pollution and spillage. We cannot breathe fresh air. Fishes die or get fried in the polluted simmering rivers. Water-water everywhere. But we have no clean water to drink! And now we lose the land too?

Niger: No firewood because the plants and trees are soaked in oil. What do they expect us to cook with? (Onwueme, 2002, p. 14-15).

The dialogue above paints the picture of a pauperized people. Indeed, the Niger Delta region of Nigeria is an area blessed with vast natural resources, especially crude oil. However, the people are paradoxically poor, owing to sustained oil exploration activities by successive Nigerian leaders who hardly make corresponding efforts to enhance the living conditions of the residents. Thus, it is not surprising that the citizens of Hungeria take to crime while successive

governments unleash military bombardments on the people, their homes, everything. To assert their humanity therefore, the people resort to protests.

Protest becomes a principal change factor in the gender performance of the characters in the play. Beginning from the Prologue, the fluidity of gender performance is made manifest. At first, women cower in fear over gunshots and heavy bombardments from the military.

Wounded and out of breath..., they continue to nurse and comfort the traumatized who still cry out loud: 'They took her... tore her up before me. See! See what they're doing to me at my old age!' an old woman cries out (Onwueme, 2002, p. 1).

This superfluous outpouring of emotions conveys the vulnerability of women. This portrait of women as fragile beings coheres with the traditional gender description of women as weak and defenseless. In traditional Nigerian societies, women are expected to be domestic, weak, naïve and acquiescing. Thus, the forgoing image of women in the play establishes their prevailing gender performance as dictated by the norms in the Niger Delta area of Nigeria.

However, the continuous bombardments and gunshots fail to break their spirit but soon transforms the women's apprehension into a collective will to protest. This is in tandem with the Butlerian postulation that "...subversion is precisely an incalculable effect. In fact, that's what makes it subversive" (2009). To destabilise an instituted gender performance of an individual is not an intentional activity influenced by choice. Subversion of gender performance is a consequence of an overwhelming condition, inspired by the subject's inability to maintain a gender identity created and repeated overtime in different sites of discourse.

The playwright captures the subversion process as follows:

For a while, thick shrouds of silence drape the land, until one by one, (the women) *re-emerge, angry, defiant, determined to be no longer crippled with fear and silence*. With everyone gathering, soothing and holding on to the other, they slowly form a human chain until they break into songs of solidarity (Onwueme, 2002, p. 1; emphasis added).

Apparently, the hitherto gender performance of women as weak and pathetic preys of violence is swiftly transformed into that of defiant, rebellious purveyors of protests. The point being made here is that, beginning with protest over their conditions in the fashion Augusto Boal describes as rehearsals for revolution, the women develop militant traits that are traditionally considered masculine in Nigerian sociocultural settings. As evident in the instances of gender role transformation that inundates the play, the rigid demarcation between the normative gender performance of men and women, is blurred. This coheres with Butler's theory of performativity (as elaborated in *Bodies that Matter*) which defies categorical comprehensions of gender, proposing that gender is established (and

re-established) through ritualized performances of gender norms. She also suggested prospects for subjects to subvert gender through de-instituting the instituted acts. The initial gendered behaviour of the women in *Then She Said It* is in consonance with Nigerian norms for femininity: feeble, gentle, placatory, seen but not heard.

In fact, in many parts of Nigeria, women's traditional gender roles are largely inferior to those of men. I. E. Nwosu reinforces this point as follows:

Historically, in the typical traditional African Society such as Nigeria, women are not only perceived as inferior to men but are marginalized and denied equal opportunities as the men, and women are treated as "lower gender" or "weaker sex"... the general belief is that the role of women start and end with running of the home and nothing more... women constitute the group at the bottom of the ladder in many developing countries, especially in Africa, in respect of employment, poverty, education, training and status (2012, p. 1240).

Drawing from the foregoing, it is apparent that the women's unconscious dereliction of their traditional gender performance in the play, illustrates Judith Butler's theory of performativity in terms of the fluid gender identity their actions generate.

Onwueme's *Then She Said It* presents gender as an unstable experience; its variability being dependent on the current conditions, not choice, of the characters. In 'Movement One', Oshun, the young daughter of Niger, is an object of male gaze who readily markets herself to Atlantic, an oil mogul. The stage direction and dialogue below describe her thus:

Her red short skirt, sleeveless blouse, which taunts the eyes, rudely announce her agile, youthful body mounted above platform shoes... Atlantic pulls her into his bosom, and sends his hand to work and wander around her willing body.

Atlantic: (*To Oshun*): Sweetie. More baby. More!

Oshun: To you. I'm at your service...

Atlantic: You belong to me, Babe.

Oshun: Now (Onwueme, 2002, p. 3).

Evidently, Oshun's gender performance here is in consonance with the orthodox gender performance of some women in Nigerian drama. She is not important to Atlantic beyond the gratification of his sexual desire. On the other hand, Oshun considers him only as a source of income. She confides in Obida that, "...We'll keep playing the fool to get what we want" (Onwueme, 2002, p. 11).

In reconciling this statement with the extant notion of femininity in Nigeria, it becomes obvious that Oshun's compliance with normative expectations of her gender category is psychologically precarious; she unconsciously admits that her gender role in relation to Atlantic's equals 'foolishness' but is further compelled by

socioeconomic pressure to key in accordingly. Beyond the surface level, it can be inferred that the workings of her mind contradict her gender performance; her interiority is at variance with her exteriority. Her interior self, suppressed by overwhelming realities: crushing poverty and the desire to make money, assesses her current exteriority – gender performance – as foolish. However imprudent, Oshun necessarily keys into such gendered behaviour to sustain her gender identity and reinforce the trending mindset of many young Nigerian girls in her condition who believe that, ‘a lady uses what she has to get what she wants’.

Commenting on the compelling influence of norms on gendering and sexing bodies, Butler states that peer pressure and allied societal norms constitute a practical problem in the society. For instance,

If you are in your late twenties or your early thirties and you can't get pregnant for biological reasons, or maybe you don't want to, for social reasons – whatever it is – you are struggling with a norm that is regulating your sex. It takes a pretty vigorous (and politically informed) community around you to alleviate the possible sense of failure, or loss, or impoverishment, or inadequacy – a collective struggle to rethink a dominant norm (1996, p. 113).

In keeping with the excerpt above, the growing quest to challenge all institutional oppressions combines with Oshun's eventual discovery of her exploited status to form the ‘vigorous’, ‘politically informed’, ‘collective struggle’ to rethink and dislodge a dominant norm. It is not surprising therefore that, in Movement Five when she eavesdrops on Atlantic's conversation with Chief Ethiope – the villagers' representative who trades his nieces to the white expatriates in exchange for wealth, the exploitative motives of Atlantic and his oil company dawn on her. Thus, she resolves to teach them a lesson. Expectedly, this realization occasions a change in her relationship with Atlantic in Movement Six:

Atlantic: I have you. Where do you think you're going?

Oshun: Home.

Atlantic: Why be in such a rush?

Oshun: It's time. Time. I'm done...

Atlantic: ...Why this sudden change...But haven't I been treating...taking care of you?

Oshun: That you have. But don't you think I can do it better for myself instead of having to depend... (Pause.) Anyway, I'm on my way now. Got to move on!

(Onwueme, 2002, p. 47-8).

This dialogue shows that Oshun's recognition of her subsidiary and subordinate relationship with Atlanta, leads to protest. Incensed by her realization of Atlantic's exploitative antics, Oshun discards her poverty-induced gender performance and, in consonance with Butler's theory on gender performativity,

unconsciously exteriorizes her interiority: she becomes firm, assertive and decisive – gender attributes traditionally ascribed to masculinity.

In Onwueme's *Then She Said It*, the traditional character of masculinity is impulsively bestowed on female characters during protests. For instance, Obida, a serial rape victim, is empowered with demonstrable leadership qualities. Her defiance is a big shift in posture as she is transformed and endowed with defiant attitudes, in protest against an oppressive status quo. Cuklanz and Moorti posit that "This 'post-rape' narrative strategy permits the character to side-step" the harrowing consequences of rape (2011, p. 117). Obida's resoluteness thus proves that, instead of languishing in laments, a woman can also have a successful life after rape. Indeed, and according to Cuklanz and Moorti, "There is life after rape – that is, the raped woman is a survivor" (2011). Poised for protests therefore, Obida confronts the major forces of oppression in the play. Jeremiah S. S. Methuselah describes her as follows:

Obidah, who has clearly demonstrated leadership qualities, is however, undaunted. In spite of the clash she has with the police earlier on, the next time we see her, she is organizing the women and youth to protest in front of the GRA/Oil club (2010, p. 122).

Aside Oshun and Obida, women in the play resort to protest as a collective survival strategy and, in the process, challenge normative feminine gender performances, and acquire attributes that are traditionally defined as masculine. This makes gender a fluid and dynamic experience in the play.

Beyond the female characters, male characters in the play also undergo changes in their gender performance. Kainji, Oshun's lover, is passive in many fronts: he depends on Oshun for job and even protection. She describes him as her "handbag" with whom she travels. Evidently, Kainji's gender performance subordinates him to Oshun just as she is initially dependent on Atlantic. Kainji's gender performance contradicts the customary gendered behaviour of men in Nigeria. The customary concept of masculinity in Nigeria prescribes resoluteness, ambition, assertiveness and domination. However, Kainji's eventual assumption of duty as Atlantic's guard suddenly lionises him, rendering him aggressive and proactive, in line with the traditional gender roles of men. This transformation demonstrates the Foucauldian principle upon which Butler builds her theory of gender performativity. "The Foucauldian premise", according to Butler, "stipulates that power works in part through discourse and it works in part to produce and destabilise subjects" (1996, p. 112). It can therefore be inferred that Kainji's new status as guard partly establishes a new subject for him, destabilising his former gender performance/identity.

Similarly, Atlantic's penchant for threats, aggression and tyranny soon softens, and he becomes placid. His cowardice is most manifest when the women gear up for confrontation. The dialogue goes as follows:

Atlantic (*Frightened.*): They're already here?

Government Official: No, they're marching.

Atlantic (*Alarmed.*): Where?

Government Official: On the streets.

Atlantic: They're coming? (*Sighs.*) I'm finished. Hold me... finished. We're finished... (Onwueme, 2002, p. 98).

The hitherto aggressive Atlantic becomes completely emasculated when he is abducted by the 'women'. This singular act amplifies the idea of gender role reversal and confirms as well as reinforces Butler's notion of gender performativity, which discountenances the ascription of any permanent attribute to a particular sex, in the absence of repeated performances which institute and sustain it.

Akin to Atlantic's change in gender performance is Chief Ethiopie's infantile reaction to his realization that the women have seized and disrobed the Trial Judge: Obida is dressed as the Trial Judge while Koko dons the outfit of the Defense Lawyer. Chief Ethiopie is rendered powerless and weak. Swiftly, these new attributes destabilise his former gender performance and identity from ego-driven libidinous sexuality and licentiousness to that of cowardice and extreme anxiety. Recognising Koko and Obida, Atlantic and "The Chief (are) horrified by the sight of the scarified women before them... (and Chief) falls as he grips them both... The men are stupefied..." (Onwueme, 2002, p. 115). This scenario marks the women's success in taking their ordeal to the global stage.

Onwueme's *Then She Said It* is a reinforcement of Butler's concept of performativity – whereas the enforcement of socio-cultural norms fix sex roles for men and women, gender identities are de-instituted by incalculable circumstances which combine to frustrate the sustenance of an already established gender performance. The change and manifestations of weakness, fear and anxiety in Chief Ethiopie are extreme to the extent that no one would realize his former performed behaviour or even associate him with domestic and sexual abuse, rape, violence, immorality and insensitivity.

Conclusion

Tess Onwueme's *Then She Said It* projects protests against exploitations perpetrated by patriarchal society. In the play, protest is presented as not only a viable weapon in the fight against oppression and exploitation but also a major factor that determines the impulsive alteration of an individual's gendered

dispositions. At first, the male characters are portrayed as exploitative, brutish and wicked while the female characters are characterised as passive victims of patriarchal sociocultural constructs and the former's brutality. These portrayals cohere with the conventional notion of gender roles in Nigeria. However, in the times of protest, both the male and female characters unconsciously cross the border of their gendered behaviour, and engage in role reversal – the female characters become aggressive and resistant while the male characters cease to be exploitative and plead for peace. Incidentally, few women in Nigerian drama are presented as exploitative due probably to the traditional notion of gender roles in the country – men occupy most positions of authority while women are almost shut out.

The strict demarcation of gender roles along biological lines 'de-realizes' the gender performance of men and women in the play under focus. Thus, the study establishes that circumstances constitute a major determinant for the sustenance or shift in an individual's gender performance. Examining Onwueme's *Then She Said It* against the backdrop of Judith Butler's theory of gender performativity, this paper concludes that gender performance is not culturally prescribed but conditionally determined. Being a temporal and performative experience, gender is fluid and unstable. The preoccupation of one's interiority together with current circumstances is a catalyst for one's gender performance; the performance being an exteriorization of the inner self. This explains why the characters in the plays, regardless of their sexes, exude attributes traditionally associated with men, in times of comfort and affluence, and reverse such gender performance in the face of opposition, danger and peril.

References

- Achebe, C. (1983). *The Trouble with Nigeria*. Enugu: Fourth Dimension.
- Akubor, E. O. (2011). The travail of women in the crises in the Niger Delta area. *Anthropologist* 13(1), 27-31.
- Amaefula, R. C. (2016). Ideological commitment and portrait of women in the plays of Stella 'Dia Oyedepo. In Nwabueze, E. (Ed.), *African Female Playwrights: A Study of Matter and Manner*. Enugu: ABIC, pp. 258-275.
- Aristophanes. (1984). *Lysistrata*. In: William A, Richmond A and Douglas P (Trans) *Four Plays*. New York: New American Library, pp. 342-460.
- Asigbo, A. (2013). *Fighting from the Trenches: Nigerian Playwright and the Task of Nation Building*. Awka: UNIZIK press.
- Butler, J. (1993). *Bodies that Matter: On the Discursive Limits of Sex*. New York, Routledge.
- Butler, J. (2013). From interiority to gender performatives. In Richard J. L. (Ed.), *Global Literary Theory: An Anthology*. Oxon: Routledge, pp. 581-587.
- Butler, J. (1996). Gender as performance. In Osborne. P. (Ed), *A Critical Sense: Interviews with Intellectuals*. New York: Routledge, pp.12-26.
- Butler, J. (1999). *Gender Trouble: Feminism and the Subversion of Identity*. New York: Routledge.
- Butler, J. (2007). Imitation and gender insubordination. In Gilbert, S. M. & Guber, S. (Eds), *Feminist Literary Theory and Criticism: A Norton Reader*. New York: Norton, pp.708-722.
- Butler, J. (2009). Performativity, precarity and sexual politics. *AIBR*. 4(3), i-xiii.
- Butler, J. (2004). *Undoing Gender*. New York: Routledge.
- Clark, C. A. (2009). To kneel or not to kneel: gendered nonverbal behaviour in Greek ritual. *Women, Gender and Religion*, 5, 6-20.
- Clark, J. P. (1977). *Song of a Goat*. Ibadan: Ibadan University Press.
- Clark, J. P. (1991). *The Wives' Revolt*. Ibadan: Ibadan UP.
- Cuklanz, L. M. & Moorti, S. (2011). Television's "new" feminism: prime-time representations of women and victimization. In Dines, G. & Humez, J. M. (Eds), *Gender, Race and Class in Media: A Critical Reader*. California: SAGE, pp.560-589.
- De Beauvoir, S. (1952). *The Second Sex*. New York: Vantage Books.
- Delphy, C. (1993). Rethinking sex and gender. *Women's Studies Int. Forum* 16(1), 1-9.
- Foucault, M. (2013). Scientia sexualis. In Lane, R. J. (Ed.), *Global Literary Theory: An Anthology*. Oxon: Routledge, pp. 592-600.
- Furman, N. (1980). Textual feminism. In MacConnell-Ginet, S. (Ed.). *Women and Language in Literature and Society*. New York: Praeger Publishers, pp.45-54.
- Gbilekaa, S. (1997). *Radical Theatre in Nigeria*. Ibadan: Caltop.

- Jenkins, J. (2017). Gender trouble in the workplace: applying Judith Butler's theory of performativity to news organizations. *Feminist Media Studies* 18(2), 157-172.
- Methuselah, J. S. S. (2010). Engendering women in Onwueme's drama: *Then She Said It* discussed. *Creative Artist: A Journal of Theatre and Media Studies* 4(1), 112-128.
- Millet, K. (2007). Sexual politics. In Gilbert, S. M. & Guber, S. (Eds.), *Feminist Literary Theory and Criticism: A Norton Reader*. New York: Norton, pp. 336-350.
- Mills, S. & Mullany, L. (2011). *Language, Gender and Feminism: Theory, Methodology and Practice*. Oxon: Routledge.
- Nwabueze, E. (2005). *The Dragon's Funeral*. Enugu: ABIC.
- Nwosu, I. E. (2012). Gender role perceptions and the changing role of women in Nigeria. *International Journal of Agric. And Rural Development*, 15(3), 1240-1246.
- Oakley, A. (1985). *Sex, Gender and Society*. London: Temple Smith.
- Obafemi. O. (2002). Making a difference through theatre in a democracy. In Yekima, A. & Akinwale, A. (Eds.), *Theatre and Democracy in Nigeria*. Ibadan: Kraft.
- Okoh, J. (2000). *Edewede*. Owerri: Totan.
- Onwueme, T. O. (2002). *Then She Said It*. Lagos: African Heritage Press.
- Oyedepo, S. (2000). *My Daughter is an Egg*. Ilorin: Delstar.
- Oyedepo, S. (2002). *The Rebellion of the Bumpy-Chested*. Ilorin: Delstar.
- Salami-Agunloye, I. (2006). Emerging trends from the shadows? changing patterns in Edo women's political participation. *Women, Theatre and Politics: A Contemporary Perspective*. Ibadan: Saniez, pp. 89-106.
- Tyson, L. (2011). *Using Critical Theory: How to Read and Write about Literature*. 2nd ed. Oxon: Routledge.
- Uko, I. (2004) *Gender and Identity in the Works of Osonye Tess Onwueme*. Trenton, New Jersey: Africa World Press.

Contact

Rowland Chukwuemeka Amaefula
Alex Ekwueme Federal University
Ndufu-Alike, Ikwo, Nigeria
emy4real2004@gmail.com